Client Services Officer

At DPM, we support the financial wellbeing of medical professionals and we're great at what we do! We're not your typical financial services company. We're down to earth, collaborative, and genuinely care about our clients and each other. Our Advisers offer top-notch Wealth and Insurance advice to high-net-worth clients, and we couldn't do it without our fantastic admin support – that's where you come in! Join our team of Client Services Officers and Associate Advisers to ensure our clients receive the best service possible.

This role is a great opportunity for someone passionate about the insurance industry or an experienced Client Services Officer seeking a new opportunity in a supportive team.

What's in it for you?

- Flexible working: we support a balanced work style, incorporating a blend of office and work from home
- Additional leave: enjoy 5 additional days of paid leave days annually
- Motivating team: be part of a forward-thinking, energetic, and supportive team committed to constant learning and development
- Great location: work from our brand new, modern office located conveniently on St Kilda Rd, right next to the Anzac Station and tram stop.
- Professional growth: gain experience within a highly respected financial services firm, with exposure to both clients and insurance operations

Your role will include:

- Supporting your Adviser to provide an exceptional level of service to a high net-worth client base including managing their diary, booking client appointments, and building relationships
- Managing the end to end implementation of financial advice ensuring compliance with business processes and legislation
- Maintaining clear and professional communication with clients ensuring they are kept up to date as their implementation progresses
- Preparing documentation and coordinating client meetings
- Assisting with end-to-end processing of Insurance applications including, but not limited to, generating quotes, assisting clients with new business, and increase application completion and lodgment, and liaising with clients to obtain medical and financial information
- Accurate and effective management of our client database (Xplan)
- Building client relationships and liaising with financial institutions
- Adhering to policies and legislative requirements
- Undertaking a variety of challenging support responsibilities that makes everything just work perfectly!

You will be successful in this role because you are:

- Experienced working in the financial planning or insurance industry
- Experienced with Xplan *(desirable)*
- Tech savvy and know your way around the Microsoft suite – Work, Outlook, Excel
- An enthusiastic and innovative individual with a can-do attitude
- A great communicator with exceptional written and verbal communication skills
- A highly organised individual with a strong attention to detail

BETTER TOGETHER ALWAYS LEARNING DELIVER WITH INTEGRITY BE YOU

The full position description is available on the next page.

Interested?

Take the exciting next step in your career with a progressive and supportive company – apply today!
Candidates that wow us will be contacted immediately
To be eligible, you must be an Australian Citizen or PR, or have full working rights.

Client Services Officer

Division:	Operations
Department:	Advice Operations
Manager/ Team Leader:	Operations Manager, Advice
Position description review:	January 2025

Purpose

The Client Services Officer provides high level administrative support to the AFSL team to ensure seamless provision of advice and customer service.

What does success look like for this role?

- Client service is of a high standard and at the forefront of behaviours/actions
- The Consultant's time is adequately managed with appointments/meetings/priorities
- Client related information and data is maintained correctly/accurately
- Completed work has minimal errors and is delivered in a timely manner
- Processes, software usage, calculations and analytics are carried out accurately, efficiently, and effectively
- Contributing to the overall operations and continuous improvement of the Advice Operations team

Responsibilities

Support & Administration

- Coordinate Consultant(s) calendar to resolve conflicts and exercise judgement on priorities
- Manage and produce communications on behalf of Consultant e.g. emails, mail, calls and voicemail
- Provide word processing support e.g., file notes, reports
- Proactively contribute at team meetings
- Support the team as required
- Assist with reviewing, developing and documenting Xplan workflow processes (Threads) in conjunction with the Operations Manager

Client & Meeting Support

- Providing efficient and courteous service to all client and key stakeholders
- Coordinate the client appointment booking process (phone or email)
- Contact clients as required to collect additional information, respond to enquiries, follow up on outstanding paperwork or when requested by consultant
- Follow up Consultant(s) post meetings to ensure action items are noted/followed through

- Management of all files, documentation and client information on CRM systems (Xplan) to ensure high standard of internal compliance (training provided, as required)

Advice Support

- Coordinate/implement end to end advice process for clients (in partnership with Consultant)
- Liaise with external providers to obtain policy/account information
- Obtain insurance/Wealth product research material from Xplan
- Obtain client information from external/internal stakeholders to assist in pre-meeting planning and application completions
- Collate and distribute client documentation this includes but not limited to: Statement of Advice (SOA), Records of Advice (ROA), Authority to Proceed (ATP). Liaise with paraplanning team to facilitate/track production of advice documents
- Ensure client information/documentation is updated and stored/scanned correctly in Xplan
- Complete applications including pre/post requirements and general product queries (e.g. preparing quotes, helping clients complete application forms, liaising with providers/underwriting teams,)
- Arrange any relevant underwriting requirements; medicals, questionnaires, financials, etc where required
- Ensure regular reviews are scheduled and tracked and Consultant is up-to-date on reviews due

General

- Maintain industry and technical knowledge
- Provide policy information to accountants and other internal stakeholders as requested
- Ensure work practices are conducted in accordance with DPM's values and compliance requirements
- Provide reception relief support (where required)

Qualifications, Skills & Experience

- Ideally, have experience working in the financial planning industry
- Proficient in the Microsoft Office Suite i.e. Excel, Word and Outlook
- Xplan knowledge (desirable)
- Excellent communication skills (written and verbal)
- Demonstrated ability to plan, organise and prioritise
- Team player with demonstrated leadership capability
- High level of initiative and exceptional attention to detail
- Demonstrated ability to keep accurate records and reports