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 financial planning 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 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

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!
To be eligible, you must be an Australian Citizen or PR or have full working rights.

We're currently on a break and look forward to receiving your application when we return. We will be reaching out to candidates from Monday 12 January. Have a safe and happy holiday – we'll be in touch shortly!

dpm BETTER TOGETHER ALWAYS LEARNING DELIVER WITH INTEGRITY BE YOU