

## Administration Assistant – Boutique Financial Planners

- **Work directly with business owners**
- **Circa \$35,000 to \$45,000 + Super**
- **Stability of an established practice**
- **Learn a variety of skills and excellent career opportunities**

**We are:** . An independently owned financial consulting service managed by business owners where we combine business experience with innovation and new ideas. We aim to help clients within Australia choose a financial plan to provide the freedom to enjoy life now and to suit personal needs.

We have over 40 years of combined experience and more importantly have helped our clients through the longest and deepest share market fall since the depression of the 1930's. During 2008 and 2009 our business continued to grow where some financial planning and fund managers have closed.

As specialists in lifestyle planning and the self-employed, we aim to deliver exceptional results and if it suits your goals, we will treat your financial plan as your business.

**As an Administrative Assistant**, reporting to the Managing Director, you will be responsible for general office duties, reception and client queries but progressing to building relationships with clients within the financial planning or mortgage brokering space as well providing customers with exceptional customer service and financial plans.

### **To be successful in this role you will require:**

- Preferably be RG146 compliant and working your way towards ADFS
- Preferably Proven performance in financial planning and customer relations
- Ability to provide exceptional client service
- Ability to build relationships in a small work environment
- A high level of communication skills both verbally and in writing.

**Benefits:** You will enjoy the stability of this boutique practice and wealth management company that can offer career opportunities locally and soon nationally to meet your career aspirations. You will enjoy working with the owners of the business to ensure that your career goals are met. This position has an attractive flexible package for the right individuals.

To apply for this position, please email Kristi your resume in Word format only, to [info@360degreewealth.com.au](mailto:info@360degreewealth.com.au) stating the job title.