Financial Planning
Client Service Administration Officer

Centric Wealth's Financial Planning Division offers a financial planning service to clients who seek high quality, individually tailored advice and the opportunity to communicate with experienced professionals in the areas of; wealth creation, superannuation and retirement strategies, investment advice, philanthropy, expatriate services and investment portfolio support.

Centric Wealth's Financial Planning division is seeking an individual who has had between 3 – 5 years experience working within a financial planning environment, in an administration and client service officer capacity.

The role comprises of all administrative functions associated with client investment portfolio management and client service relationship building. The position is not an entry level administration role or a Para Planning position. Interest from suitably experienced administration applicants will only be considered.

Key responsibilities:
Manage approximately 100 plus clients in all facets of investment administration
Active communication with clients, team members & financial institutions
Correspondence, completion of forms, data entry & project management

Essential skills & requirements
Microsoft office applications – word, excel & outlook
Competent typing ability
Experience in dealing with Listed Securities & Managed Funds
Experience in working in a team environment
Client service experience
Highly competent, attention to detail & excellent communication skills

Desirable skills, but not essential
Financial planning software experience – Visiplan or Xplan
Wrap Platform administration
DFP or equivalent industry qualifications

The position will ideally suit someone with a financial planning administration background, although applicants with a relevant banking/ client service or with fund manager / client service/ administration background may be considered.

The individual must have a mature outlook, enjoy a degree of responsibility and have a 'can do' 'hands on approach to their work. They must have a passion for administration and enjoy engaging with clients and their team.

Please send applications to karol.zdravevski@gmkcetnric.com.au by 31 July 2009.