JOHNSONS MME
Financial Advisory

Administrator

Position Summary

Assisting in the provision of client service through implementation and ongoing administration of client's financial strategies.

Major Tasks

- Liaising with advisers, staff and third parties
- Incoming email and mail management
- Preparation of implementation paperwork for advice documents
- Preparation of documents for client meetings
- Updating and maintaining of client records
- Management of client appointments
- Printing, scanning and dispatch of advice documents
- Centrelink applications, updates and management
- Other tasks as required

Attributes, Knowledge and Skills

- Ability to work independently and take responsibility for completion of tasks according to agreed schedule.
- Excellent written and oral communication skills with high attention to detail
- Microsoft Office skills
- Able to use initiative and judgement in problem solving situations

Education and Experience

- Previous experience desirable but not required

Email: hr@jmme.com.au for further information