Paraplanner/Associate Adviser

Position Summary

To provide support and technical assistance to advisers in the client service process and to prepare high quality Statements of Advice (SoAs) within agreed time frames and up to the standards required by legislation and internal policies and procedures.

A trainee financial advisor will have a greater level of client contact than a para-planner, including sitting in on client meetings, liaising with clients, brokers and product providers, as well as acting as a secondary level of support for client enquiries.

Major Tasks

- Preparing Statements of Advice, Records of Advice and other related material in accordance with internal policies and procedures
- Assist advisers and clients with the preparation and implementation of strategies as required.
- Preparing ongoing client reports and assisting with the effective implementation of ongoing services
- Dealing with client enquiries as required
- Assisting the advisors and accountants in managing SMSF clients
- Undertake timely execution of investment transactions
- Managing and maintaining xplan software
- Managing broker and fund manager reports
- Participate in ongoing professional development training to further enhance and develop your skills
- Adhere to all compliance requirements
- Keep up to date with changes in tax, social security, superannuation, investments and any other information that is pertinent in the provision of advice to clients
- Other tasks/projects 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
- Willingness to learn and undertake professional development
- Understanding of the financial planning process and basic knowledge areas
- Microsoft Office skills
- Able to use initiative and judgement in problem solving situations
- Ability to critically analyse information

Education and Experience

- PS146 compliant
- Experience with Financial Planning software, preferably Xplan
- Previous experience in the financial services industry

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