

## *Client Services Concierge - Private Wealth – Financial Planning*

- Fixed-term 12 month contract (with a view to permanency)
- A progressive role with a huge internal support network
- 'Free' leave over the festive season

Are you an experienced administrator within the financial planning space with a passion for client service? Are you looking at stepping into a role full of challenge in a dynamic and supportive team? Wealth Effect are committed to developing our employees, whilst still having a sense of energy and fun. Why not join us? Some of the benefits we proudly offer our employees include:

A professional services organisation with a great culture that really values its people Unbelievable employee benefits like EXTRA annual leave, REAL coffee, free Wi-Fi, a Monthly CBA Day plus loads more...

A focus on personal learning and development and growth for career progression A funky industrial office fit-out.

**As a passionate Client Concierge person, and reporting to a progressive and energetic Manager, a normal day would include:**

- Liaising with key internal and external stakeholders to manage the implementation of client's wealth strategies
- Managing the preparation of data and reporting for client reviews
- Maintaining the client record and information process on our internal systems
- Undertaking a range of project work to get the best out of Midwinter for our business
- Coaching and training other support team members around newly implemented processes

**Sounds like its right up your alley? Keep in mind our ideal candidate should have:**

- Solid experience in a similar role (financial services)
- Preferably RG146 (or willingness to commence study)
- Advanced co-ordination/administrative skills
- Proficient in the Microsoft Office Suite (critical) and Midwinter knowledge (desirable)
- Excellent communication skills both written and verbal
- Demonstrated ability to plan, organise, and prioritise Interested? What are you waiting for? To apply for this amazing opportunity, have a read of the position description on our website and send in your cover letter and CV via email to [andre@wealtheffect.com.au](mailto:andre@wealtheffect.com.au)