

## **POSITION DESCRIPTION**

<b>CONTEXT:</b>	<p>Strategem Financial Group is a well established tax, accounting and wealth creation services firm in Bendigo and has provided trusted financial advice to a diverse client base for over 40 years. Strategem is locally owned and operated with over 60 staff including 7 partners who provide expert advice and a multi-disciplinary approach to helping clients achieve total wealth creation. In 2008, Strategem was winner of the Bendigo Business Excellence Awards, Business of the Year.</p> <p style="text-align: center;"><b>OUR MISSION STATEMENT</b></p> <p>Strategem's mission is to create and consistently deliver superior value to our clients, employees and community.</p>
<b>POSITION ROLE:</b>	To provide administrative support to members of the Investment Services Team to achieve the objectives as defined by the Investment Services Management Team and under the direction of the Manager Investment Services.
<b>RELATIONSHIPS:</b>	<ul style="list-style-type: none"> <li>- Reports directly to Manager Investment Services</li> <li>- Special tasks and/or projects as directed by Manager Investment Services, CEO or Practice Partners</li> </ul>
<b>ACCOUNTABILITIES:</b>	<ul style="list-style-type: none"> <li>- Assists with the production and despatch of reports and correspondence in accordance with the terms of each client's specific engagement</li> <li>- Assist in the provision of current recommendations to clients by researching and recording recommendations for referral by para-planners and representatives</li> <li>- Contributes to the client communication and practice activities by processing mass mail merges and undertaking general word processing task</li> <li>- Maintaining high quality standards in presentation and work practices by undertaking training as determined by the Training Manager.</li> </ul>
<b>KEY OBJECTIVES &amp; DUTIES:</b>	<p><b>PRIMARY DUTIES:</b></p> <ul style="list-style-type: none"> <li>- Word processing of correspondence, file notes, memorandums and statements of advice</li> <li>- Production of quarterly and annual reports, superannuation fund reviews, letters, bills etc</li> <li>- Preparation of letters, corporate documentation, draft cheques and other documents for licensee's product offerings</li> <li>- Undertake scanning, copying, binding and mailing</li> <li>- Establish and maintain client records as outlined in the Procedures Manual</li> </ul>

	<p><b>SECONDARY DUTIES:</b></p> <ul style="list-style-type: none"> <li>- Assist with filing and archiving of records when required</li> <li>- Receive record and reconcile fund manager broker statements on a monthly basis.</li> <li>- Support the day to day operations of the dealing desk as and when required</li> <li>- Other duties as directed</li> </ul>
<p><b>SELECTION CRITERIA:</b></p>	<p><b>ESSENTIAL- Position Specific:</b></p> <ul style="list-style-type: none"> <li>- Ability to work in Windows based programs including Microsoft Work, Excel and Outlook.</li> <li>- Ability to follow set procedures to produce a consistently high quality output</li> </ul> <p><b>DESIRABLE- Position Specific:</b></p> <ul style="list-style-type: none"> <li>- Sound research skills</li> <li>- Sound knowledge of the internet</li> </ul> <p><b>ESSENTIAL – Practice Wide:</b></p> <ul style="list-style-type: none"> <li>- <u>Communication &amp; Interpersonal Skills:</u> The ability to effectively transfer ideas, concepts and information. The ability to create, maintain and enhance relationships with clients and staff in order to achieve work goals.</li> <li>- <u>Customer Focus:</u> The ability to anticipate and meet the needs of clients and fulfil the Group’s commitment to putting the interests of the client first.</li> <li>- <u>Teamwork:</u> The ability to effectively contribute to the establishment, maintenance and success of work teams, focused on achieving individual, team and organisational goals.</li> <li>- <u>Time Management Skills:</u> The ability to work under pressure, meet key deadlines and budget available time verses multiple tasks effectively and efficiently.</li> </ul>
<p><b>EMPLOYMENT CONDITIONS:</b></p>	<ul style="list-style-type: none"> <li>- Refer to relevant Employment Agreement.</li> <li>- Satisfactory completion of both a Police Check and an Credit Check prior to commencement of employment</li> <li>- 6 month probationary period.</li> </ul>