

POSITION DESCRIPTION

CONTEXT:	<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;">OUR MISSION STATEMENT</p> <p>Strategem’s mission is to create and consistently deliver superior value to our clients, employees and community.</p>
POSITION ROLE:	<p>Member of the Self Managed Superannuation Fund team which is responsible for the administration and compliance requirements of funds on behalf of clients.</p>
RELATIONSHIPS:	<ul style="list-style-type: none"> – Reports directly to Team Leader – Special tasks and/or projects as directed by SMSF Partner/Team Leader
ACCOUNTABILITIES:	<ul style="list-style-type: none"> – Assist with the daily updating and maintenance of fund records including taxation returns and compliance requirements – Assist with the administration of funds including the preparation of documentation as required
KEY OBJECTIVES & DUTIES:	<p>PRIMARY DUTIES:</p> <ul style="list-style-type: none"> – Preparation and reconciliation of data upload from Praemium to BGL – Collation of financial statement and income tax returns – Preparation of quarterly Activity Statements – Preparation of applications for insurance and renewal of insurance – Completion of SMSF compliance documentation – Preparation of all documentation necessary to establish new SMSF’s – Preparation of Pension commencement documents – Assist other members of the SMSF Team with preparation of correspondence, file notes and other documents – Meet all training obligations as determined by the Training Manager

	<ul style="list-style-type: none"> - Liaise with clients and manage general enquiries as the SMSF contact point - Maintain WIP and debtor ledgers <p>SECONDARY DUTIES:</p> <ul style="list-style-type: none"> - Undertake copying, binding and mailing when required - Establish and maintain client records as required - Filing and archiving of documents as required - Assist with creating, reviewing and updating the SMSF procedures manuals - Other duties as directed
<p>SELECTION CRITERIA:</p>	<p>ESSENTIAL- Position Specific:</p> <ul style="list-style-type: none"> - Computer literacy including the ability to work in Windows 2000 based programs, including Microsoft Word, Excel, Outlook and other software and web-based platforms - Adaptable to change - Attention to detail <p>DESIRABLE- Position Specific:</p> <ul style="list-style-type: none"> - Awareness of SMSF compliance issues desirable but not essential <p>ESSENTIAL – Practice Wide:</p> <ul style="list-style-type: none"> - <u>Communication & 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. - <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. - <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. - <u>Time Management Skills:</u> The ability to work under pressure, meet key deadlines and budget available time verses multiple tasks effectively and efficiently.
<p>EMPLOYMENT CONDITIONS:</p>	<ul style="list-style-type: none"> - Refer to relevant Employment Agreement. - Satisfactory completion of both a Police Check and an Credit Check prior to commencement of employment - 6 month probationary period.