

Client Service Manager

Hays Accounting Support • All Hobart TAS



Base pay

\$50,000 - \$70,000



Work type

Full time



Contract type

Permanent

Job details



Date posted

15 Jan 2022



Expired On

09 Jun 2022



Category

Banking, Superannuation & Finance



Occupation

New Business Development



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\$50,000 - \$70,000



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Work type

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Full job description

Your new company

Based in the Hobart, this Financial Planning business provide premium service to a wide range of clients with the aim to remain a business with a personal touch and also depth of experience and talent. Due to growth they are looking for a Client Service Manager to join their team on a full time or part time basis, they are flexible for the right person.

Your new role

As the Client Service Manager your core duties will be providing support to the Financial Planners. Reporting into the Director, you'll be responsible for;

- Sourcing information from suppliers regarding policy and client information as required for service delivery.
- Maintaining all client files and electronic records are current at all times.
- The accurate production of all client portfolio review documentation and reports including all compliance requirements.
- Work as autonomously and as an active member of a team.
- Follow a strict compliance regime.
- Ensure accurate and timely completion of tasks.
- Communicate with clients through multiple mediums.
- Follow-up any outstanding information or documentation from clients.

What you'll need to succeed

As the successful candidate, you'll have excellent communication skills (Both written and verbal), and a proven track record of general administration gained by practical experience in a Client Service Manager role. You'll have excellent time management skills, outstanding attention to detail, and a strong working knowledge of Microsoft Office. Previous experience with Xplan software will be advantageous but not essential. You'll also possess the following;

- Professional, positive and proactive attitude at all times.
- Exercise the highest degree of confidentiality.
- Process information accurately, promptly, efficiently and effectively and

initiative to consider implications and interdependencies.

- Meet defined timeframes and to a defined standard.

What you'll get in return

You'll receive a competitive salary based on experience and receive on the job training with a well know Financial Planning business. You'll enjoy being part of a team of hardworking, passionate, like minded individuals that will support you as you continue to grow and develop your career.

What you need to do now

If you're interested in this role, click 'apply now' to forward an up-to-date copy of your CV, or contact emily.nuttall@hays.com.au.

If this job isn't quite right for you but you are looking for a new position, please contact us for a confidential discussion on your career.

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