



# RECRUITMENT PACK

CLIENT SERVICES COORDINATOR

2016

## RECRUITMENT INFORMATION FOR PROSPECTIVE TEAM MEMBERS






We are an equal opportunity employer.

All applications are assessed on alignment with our core values, experience, qualifications (if appropriate) and responses to key selection criteria.

### SUBMISSION OF APPLICATIONS



Applications must be lodged by the advertised closing date and time. Late applications will not be considered.

Please remember to include:

-  Your contact details (postal address, email address and a contact phone number);
-  A covering letter to support your application;
-  A current resume with a minimum of two current referees;
-  Your responses to the key selection criteria;
-  Copies of any qualifications/transcripts, if relevant.

Provide as much relevant information as necessary to fully explain your capabilities. Please be concise, clear and to the point.

Applications can be lodged in one of the following ways:

-  By email to [careers@bmgpartners.com.au](mailto:careers@bmgpartners.com.au) marked to the attention of HR administrator
-  Hand-delivered to BMG 's office at 7 Stanley Street, Wodonga VIC 3690

### KEY SELECTION CRITERIA

Each opportunity for employment has a set of key selection criteria that enables prospective team members to illustrate how they can/have demonstrated the necessary qualities, knowledge and skills required to be successful in the position.

A prospective team member should provide an example or series of examples for each key selection criteria statement.

### MINIMUM EMPLOYMENT PERIOD

Under the *Fair Work Act 2009* all new employees are subject to a six-month minimum employment (probationary) period. During this period, your mentor will monitor your performance in your role as well as your overall fit with the BMG Culture.

## BENEFITS OF WORKING WITH US

Our organisation demonstrates a commitment to providing team members with a flexible, family and work-friendly environment and offers its team a variety of benefits.

Our office is located at 7 Stanley Street, Wodonga in Wodonga's CBD.

Our chief executive officer and directors are approachable, welcoming and friendly.

Some of the benefits our team members currently enjoy are:



### SUPPORTIVE CORPORATE CULTURE

We foster flexible work arrangements and a commitment to our core values.



### PROFESSIONAL DEVELOPMENT PROGRAM

We support team members in undertaking specific training to assist them in the role and career development.



### COACHING PROGRAM

A year round well structured coaching program consisting of individual fortnightly meetings to assist team members growth and development.



### SALARY REVIEW

A yearly salary review is conducted with all Team Members.



### MODERN OPEN OFFICE

We work in an open office environment with break out areas for team members and dedicated meeting rooms.



### NEW TECHNOLOGY

We are committed to the introduction and maintenance of leading technology solutions.



# POSITION DESCRIPTION

|                                |  |
|--------------------------------|--|
| DATE:                          | 03/05/2016   |
| POSITION TITLE:                | TA Client Services Coordinator                     |
| DEPARTMENT:                    | Tax & Accounting                                   |
| REPORTS TO:                    | TA Client Services Administrator/PA to TA Director |
| POSITIONS DIRECTLY SUPERVISES: | N/A  |
| HOURS:                         | Full time 37.5 hrs / week                          |
| SALARY PACKAGE:                | To be negotiated.                                  |

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## PURPOSE OF THE ROLE

The purpose of the TA Client Services Coordinator role at BMG is to assist in delivering the key services of the Tax & Accounting business to clients in accordance with the strategic direction and goals of the business for the short, medium and long term. The role is also expected to provide professional skill and guidance to other team members as required. As with all team members, the TA Client Services Coordinator role is expected to be an advocate for BMG.

## ESSENTIAL RESPONSIBILITIES & FUNCTIONS

Your essential responsibilities and functions are outlined below. Other duties may be assigned from time to time. Procedural protocols outlining these tasks can be found in the library of our document management system.

### TAX & ACCOUNTING (SUPPORT):

-  Support the TA Client Services Administrator/PA to TA Director in the completion of their tasks.
-  Client Record Collection:
  - Preparation of client checklists (requests for records), delivery of these checklists to clients and following up collection of client records
  - Review of client records coming into the office & comparing to checklists prior to handing to reception for scanning
-  ATO Liaison:
  - Liaise with ATO to prepare payment plans for clients as required
  - Action the download of all portal reports for all TA jobs prior to commencement
  - Providing ATO reports to clients and their financial institutions as required
  - Lodging NIL returns on the ATO portal
  - Request for lodgement extensions and penalty remissions as required

- 👉 ABR Updates:
  - Updating client details as required
  - Assistance with AUSKEY set up
- 👉 Client Servicing:
  - Preparation of general correspondence for TA – letters, emails
  - General client correspondence as required
- 👉 Assisting TA team in development of & enhancement to standard documents
- 👉 TA Booklet preparation
- 👉 Creation of client organizational charts
- 👉 Creation of TA Prospective Client kits
- 👉 FP Team Liaison:
  - Key point of contact between the FP and TA teams
  - Management of FP documents and information for FP / TA mutual clients

## **ADMINISTRATION (SUPPORT)**

Assist the receptionist in:

- 👉 Answering incoming telephone calls in accordance with our Phone Standards system and forward calls to appropriate personnel
- 👉 Completion of administration duties
- 👉 Take and deliver messages using MS Outlook when appropriate team members are unavailable
- 👉 Update and manage appointment calendars using MS Outlook
- 👉 Answer questions about our organisation and provide callers with address, directions, and other information
- 👉 Welcome on-site visitors, determine nature of business, and announce visitors to appropriate personnel, offer tea/coffee
- 👉 Booking and setting up webinars

## **OTHER ACTIVITIES & DUTIES**

- 👉 Commitment to achieving personal Key Performance Indicator (KPI) targets
- 👉 Work with and support team members in the completion of their key tasks
- 👉 Issue written and oral instructions to team members
- 👉 Lead by example at all times
- 👉 Be committed to the values of the business.

## **KNOWLEDGE & SKILLS REQUIREMENT**

- 👉 Highly developed communication skills & professional standards
- 👉 Understanding of the standards that apply and which are expected by our clients as part of a professional practice
- 👉 Understanding of the professional services BMG provides
- 👉 Acceptance of the employment conditions as set out in your employment agreement

## **OTHER RELATIONSHIP RESPONSIBILITIES**

- 👉 Maintain an up to date knowledge of client circumstances and needs
- 👉 Develop & maintain relationships with 'centers of influence'
- 👉 Play an active networking role within the community








# KEY SELECTION CRITERIA

DATE: 03/05/2016  
POSITION TITLE: Client Services Coordinator  
DEPARTMENT: Tax & Accounting  
REPORTS TO: TA Client Services Administrator / PA to TA Director

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## KEY SELECTION CRITERIA

Below is a selection of statements that give further insight to the BMG position advertised. Please provide [an example for each](#), illustrating where you have demonstrated the necessary skills and abilities that would enable you to successfully achieve the stated outcomes.

-  This is a demanding & diverse position. Aside from the key roles and responsibilities assigned to the position, there are often other additional tasks requiring completion. You are able to juggle & prioritise additional requests made of you while still meeting the core obligations of the role. You are able to meet often strict deadlines all the while maintaining clear lines of communication.
-  You are passionate about what you do. You believe that understanding required outcomes and goals will enable the achievement of results.
-  Your personal & professional development is a focus for you and you are always on the lookout for opportunities for improvement.
-  You are dedicated to providing an exceptional client experience and building strong client relationships.
-  You are engaged and aligned with the BMG team and the business values, fairness, results driven and what's next however not afraid to question and challenge processes and decisions.

# BMG ORGANISATIONAL STRUCTURE AS AT 3 MAY 2016

