



RECRUITMENT PACK

FINANCIAL PLANNING ADMINISTRATOR

2017



RECRUITMENT PACK

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 **9.00am Monday 24th July 2017**. 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:

-  Via email - careers@bmgpartners.com.au - Attention HR Administrator
-  In person - BMG - 7 Stanley Street, Wodonga

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

BMG provide team members with a flexible, family and work-friendly environment.

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

Our board of directors are approachable, welcoming and friendly.

Some of the other benefits our team members currently enjoy are:



SUPPORTIVE CORPORATE CULTURE

We foster flexible work arrangements and a demonstrated 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 structured coaching program consisting of individual fortnightly meetings to assist team members personal & professional 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.

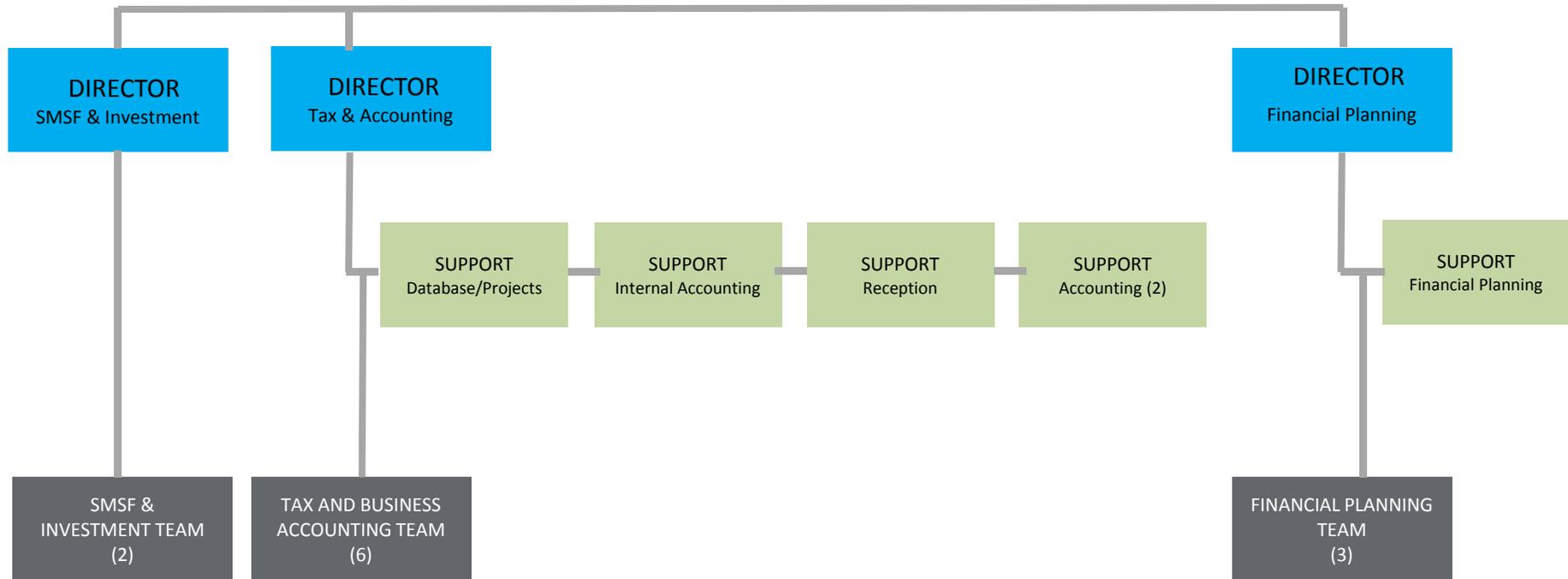


TECHNOLOGY

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

BMG ORGANISATIONAL STRUCTURE

1ST JULY 2017



POSITION DESCRIPTION

DATE:	01/07/2017
POSITION TITLE:	Financial Planning Administrator
DEPARTMENT:	Financial Planning
REPORTS TO:	Financial Planning Director
POSITIONS DIRECTLY SUPERVISES:	N/A
HOURS:	Full time 37.5 hrs / week
SALARY PACKAGE:	To be negotiated

PURPOSE OF THE ROLE

The purpose of the Financial Planning Administrator in BMG is to be the support to the financial planning team in all aspects of administration and to be the liaison to our clients in all matters financial planning related.

You will understand the strategic direction of our business. BMG's values will be reflected daily through your behaviours and actions.

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.

FINANCIAL PLANNING (SUPPORT):

-  Preparing general correspondence and forms
-  Placement of and monitoring transactions & communication of same
-  Drafting advice documents
-  Preparing files for client meetings
-  Proof read and format advices
-  Prepare files for presentation
-  Attend to the administration of new client establishment and ongoing Xplan database maintenance
-  Attending to product based client updates e.g.: address changes
-  Maintain and develop standard documents and systems
-  Attend to compliance requirements
-  FP Business reporting
-  Support the FP Director in the following roles:
 - Responding to Clients and their queries either directly or delegating to a Team Member
 - Attend client meetings, taking notes, responsibility for actions
 - Assist the FP Director where necessary

ADMINISTRATION (SUPPORT)

- Assists the receptionist in:
 - Answering incoming telephone calls in accordance with our Phone Standards system and forwards calls to appropriate personnel
 - Completion of administration duties
 - Takes and delivers messages using MS Outlook when appropriate personnel are unavailable
 - Updates and manages appointment calendars using MS Outlook
 - Answers questions about our organisation and provides callers with address, directions, and other information
 - Welcomes on-site visitors, determines nature of business, and announces visitors to appropriate personnel, offers tea/coffee

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

KNOWLEDGE & SKILLS REQUIREMENT

- Highly developed communication & 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

OTHER RELATIONSHIP RESPONSIBILITIES

- Maintain regular contact with clients and continue to build these relationships
- Maintain an up to date knowledge of client circumstances and needs



KEY SELECTION CRITERIA

DATE:	01/07/2017
POSITION TITLE:	Financial Planning Administrator
DEPARTMENT:	Financial Planning
REPORTS TO:	Financial Planning Director

Below is a selection of statements that give further insight to the BMG advertised position. [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.

- 🔑 You are engaged and aligned with the BMG team and the business values of fairness, results driven and what's next however you are not afraid to challenge processes and decisions.
- 🔑 Your personal & professional development is a focus for you and you are always on the lookout for opportunities for improvement and growth.
- 🔑 This is a demanding and diverse position. Aside from the key roles and responsibilities assigned to the position, there are often other additional requests made of our team members while still being expected to meet 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. Your work is an enjoyable part of your life.
- 🔑 You understand the importance of efficiency and managing the execution of each individual aspect of your role (the enjoyable and not so enjoyable).