

Advertisement

Administration

Our Willoughby North office needs a top Administration person full time
Our professional Financial Planning and Paraplanning staff were surveyed and asked what qualities they would like to see in a new administration team member.

We only want the best!

Email careers@bluechipwealth.com.au with why you want to join us and attach your resume.

Here's what our professional Financial Planning and Paraplanning staff said, when surveyed and asked what qualities they would like to see in a new administration team member

- Pride in workmanship
- Determined to help build a company
- Proactive/ self starter
- Not waiting for problems to come up
- Self prioritize
- Multi-task
- Own the problems/ deal with it/ fix it
- Common sense
- Use available resources
- Friendly and professional phone manner
- Be a 'Director of First Impressions'
- Builds relationships with suppliers and clients
- Have pride in personal presentation
- Reliable
- When a task is assigned, we know it will be actioned
- A project manager
- When more work than time, differentiate important and urgent
- Juggle functions
- Know when to put your hand up for help
- Detail oriented
- Systemized
- Completes tasks to the end
- Confident in their abilities
- Understands that clients are our lifeblood
- Knows that sometimes emails need to be replaced by personal phone calls

Technical skills required

- Computer literate
- Microsoft suite, including excel, word, powerpoint
- Outlook and Explorer
- Understand and work with data bases/ CRM's

The Managing Director wants a person with:

- A great positive attitude
- A 'can do' attitude
- Someone you want and like to have around the office
- Understands that clients need good service
- Can identify business opportunities
- Can write a letter with good grammar and spelling
- Speaks English very well
- Good with a spreadsheet
- Thrives and wants to drive real change in our business
- The detail is done
- A good communicator
- Who does not need micromanaging
- We know we and our clients can trust the person
- We can train good people with the right attitude
- Confidence to say to me – that's an administration job that an admin person should be doing, not you!

What the staff said about our company:

- We're excited about the changes we are making
- We have a set of very committed staff members
- Technology is embraced
- We have an established business that needs great people to grow
- We're flexible
- We're proud of what we have done
- We're going places!

For your information, this is what we want to see happen in the business in the next 6 months.

Note that all staff will have some part to play in these objectives:

- More new clients
- More of our client referrals
- Some one phone all of our clients
- Improvements in systems
- Better use and more use of available technology
- More professional staff in lending and financial planning

This is what we want you to do

- Answer the phone and emails
- Open the mail
- Scan documents and file accurately
- Input client data into our online system
- Respond to client queries, online, by phone
- Chase up clients and product providers assertively, professionally and in a friendly manner
- Support all staff in their quest to deliver great client service
- Help planning staff grow our client base
- Co-ordinate client seminars
- Email newsletters
- And heaps more

This is what is possible for you:

Training in financial planning and lending

Develop a career path in any number of areas, such as insurance, investment, loans

Simply become one of the most important people in our business – the business can't operate without great administration

Grow your salary along with our company

Employment Benefits

Salary is paid monthly

2 weeks mandatory Christmas New Year holiday (plus 2 more throughout the year)

Great professional office in Willoughby North

Initial remuneration is \$30,000 pa plus 10% superannuation

Usual office hours, with some flexibility

4 week probationary period

So, if you think, feel and know you have the qualities to drive and thrive in our Administration area, email careers@bluechipwealth.com.au with why you want to join us and attach your resume.