

Senior Client Services Manager

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Company: DCL Recruitment

Location: Australia

Category: other-general

Senior Client Services Manager

****SUCCESSFULLY FILLED****

Above Market Salary \$\$\$

Our client is a highly regarded boutique financial planning business who are experiencing a high growth phase and are looking to welcome into their team a Senior Client Services Manager.

Located in Dee Why they offer invaluable exposure to a diverse client base within a close knit and supportive team, flexible work arrangements, competitive remuneration and long term career opportunities.

The Role

Working autonomously alongside the financial advisers you will be responsible for the professional delivery of client services and administration getting to know your clients well.

Responsibilities

- Liaising with clients, third party product and service providers
- Supporting the finalisation of statements and records of advice
- Responsible for 'on boarding' new clients and ongoing administration of existing clients
- Responsible for the implementation of advice documents & providing progress/completion updates for clients
- Producing correspondence, reports and non advice related support
- Client database management

Ideally you will have

- Minimum 3 years experience supporting a Financial Adviser
- Experience with AdvisorLogic or similar advice software
- Positive attitude and desire to work as part of a high functioning team
- Strong interpersonal communication skills
- High attention to detail and accuracy
- Sound understanding of the financial services industry

Dee Why Location – street parking and close to public transport

Above market salary \$\$

Flexible working arrangements

Cohesive and supportive team

You will be rewarded with training mentoring, a fantastic work environment where your milestones and achievements are celebrated!

Please send your resume to helen@dclrecruitment.com.au or call Helen for more information on 9905 3566

Register your interest online

OR

Call DCL Recruitment on 02 9905 3566

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