**About Armstrongs**

We suspect that many people think that working in financial planning is boring and tedious. But we love it. It gives us enormous satisfaction to know that we are helping our clients by organising and taking care of their finances and affairs so they can focus on the things they love. And although we work hard and take our jobs seriously, we balance it all out by regularly having morning tea/lunches/drinks together as a team. (By the way, if you're a coffee or café lover, you're in luck as our lovely new premises are within a short walk of some of Albury's best.)

Armstrongs has operated in central Albury for the past 28 years, the last 3 of those under the new ownership of Georgie Phillips and Simon Barlow. We are a small, privately owned business and unlike the majority of financial planners in Australia, we choose to hold our own Australian Financial Services Licence. This means we are not employees, sales representative or franchisees of a bank, insurance company, industry superannuation fund or other product provider. Having our own AFSL puts us in control of our own destiny, and a bit like our clients, that is important to us.

We have a clear plan for where we want to take the business. We've been streamlining our internal processes and we've introduced Xplan. At the heart of our plan is the commitment to continue building a cohesive team with employees who are actively engaged in helping us build a great business. We will do this by excelling at what we do and having great relationships with our clients and each other.

We're currently a team of 6, with two of our valued team members leaving us to focus on new adventures outside the financial planning field. We're excited for them! This means we need to find two experienced new people to join our team.

**About the roles**

We are looking for two full-time Client Services Managers with a breadth of experience that enables you to work comfortably across clients with diverse needs. Being a small team also means you may sometimes need to do a bit of everything.

The mission of these roles is to build, maintain and improve trust-based relationships with our clients and to support the practice in fully delivering the service packages to clients in a timely and efficient manner.

There are two critical aspects to the roles. One is to be very welcoming and personable with our clients, to take the time to get to know them and to make sure they feel like they can call us anytime and ask us about anything that's on their mind. The other is that behind the scenes, the work performed must be of the highest standard. We care a great deal about accuracy, compliance and professionalism.

It's a given that you will be ethical. There's no tolerance for cutting corners or other shenanigans. Because we're all human, the occasional mistake is inevitable, but we want you to tell us early and openly so we can fix things.



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Naturally, in our business, trustworthiness, discretion and confidentiality are absolutely essential. The successful candidates will need to have a national police check and rigorous reference checks before a job offer is confirmed.

Here at Armstrongs we like to be flexible and we offer great career opportunities for our staff. Either role can develop into something further and would therefore also suit someone who has the desire to further their career either as an Associate Adviser or Paraplanner. We also have the capacity to offer extra responsibility from the beginning if you have already started your role as an Associate Adviser and have your necessary qualifications.

These are roles for people who have a genuine passion for working in this industry, who are committed to striving for excellence for clients. The industry has been through a lot of change in recent years and many have left the industry as a result. We understand that. The compliance aspects of our work are very onerous. But financial planning is a fulfilling career because we help people. Our clients are at the heart of everything we do. So, we don't want seat-warmers or clock-watchers. We're a small team and we work hard. We want people with drive, who will put in and help us get great outcomes for our clients. In return, as well as being paid appropriately for your skills, we offer a comfortable, flexible and enjoyable workplace plus the benefits of a small, friendly, morning-tea-loving team.

**The salary and working hours**

Both positions are full-time, working weekdays from 8.30 am to 5.00 pm. There will also be the occasional event that requires some out-of-hours work.

The salary range is $50,000 - $80,000 per annum plus 9.5% superannuation, commensurate with experience.

Award: Banking Finance and Insurance Award 2020

**Selection Criteria**

<u>Client Services Manager (CSM)</u>

1. Considerable recent experience in a financial planning firm involving a diverse client group.
2. Competence in the use of Xplan - desirable.
3. Demonstrated ability to process work quickly with minimal errors or omissions.
4. Demonstrated ability to establish and maintain warm professional relationships with both clients and work colleagues, including getting to know clients' individual needs and expectations.
5. Demonstrated professionalism in presentation of work outputs, especially anything that is sent to clients.
6. Demonstrated commitment to ongoing improvement of systems and processes (please provide an example).
7. Demonstrated sound self-management skills (e.g. time, energy, composure, workflow, priorities and deadlines).
8. Demonstrated commitment to ongoing professional learning and growth, including the willingness to give and receive constructive feedback, and to ask for help or input.
9. A genuine interest in contributing to the running and development of the business. If you don't have any directly relevant experience to relate, please tell us a (true) story about yourself, whether in an unrelated workplace or outside of work that speaks to this criterion.
10. High level of competence in use of the Microsoft Office suite and Outlook
11. Experience in liaising with Centrelink on behalf of clients – desirable.

Position 2 – CSM/Associate Advisor

1. As above; plus
2. Commencement of Study for advisory qualifications.
3. Experience with preparing for client planning meetings and participating in strategic advice development.

**How to apply**

The recruitment process is being managed for us by Ellyn Martin from Business Growth Strategies.

If you are interested in the position, please send your written application and resume to ellyn@businessgrowthstrategies.biz by 12 noon on Wednesday 3rd February 2021.

***Please note: your application must address each of the selection criterion individually.***

**Additional information about the recruitment process**

- Ellyn will do an initial shortlisting of applicants based on written responses to the selection criteria;
- Those who are unsuccessful at this stage will be advised by email;
- Ellyn will conduct a brief (30 - 40 min) telephone interview at a mutually agreed time to further shortlist applicants;
- For applicants selected to proceed to interview stage, there will be a face-to-face 90-minute interview;
- ***The interviews will take place on Wednesday 24th February 2021 at Armstrongs Financial Advisers, 531 Macauley Street Albury NSW***
- Applicants who are offered a face-to-face interview will be asked to undertake a short (10 to 15 minute) online Talent Dynamics profile assessment prior to the interview (instructions will be provided);
- Following the interview, the preferred candidate/s will be asked to provide the names and contact details of 3 - 4 referees, including someone from their current place of employment (if applicable). We will discuss with you who we'd like to speak with.
- The successful candidate will have a 6-month probationary period.

***If you need more information about the role, please contact Georgie Phillips on 0414 620 300 or georgie@armstrongsalbury.com.au.***

***If you need more information about the recruitment process, contact Ellyn Martin on 0412 375 760 or ellyn@businessgrowthstrategies.biz.***