Client Service Manager / Associate Adviser

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.

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 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.

About the roles

We are seeking Client Services Managers or Associate Advisers 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.

Naturally, in our business, trustworthiness, ethics, 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.

We are looking 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 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 team.

If this sounds like you, we'd love to hear from you. Please get in touch with Georgie or Simon to have a coffee and a chat, our door is open.

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