Client Services Officer / Associate Advisor

Partners Wealth Group

At Partners Wealth Group (PWG) we are proud of our dynamic culture. We have and will continue to invest a lot in our people, systems and facilities and have seen exciting growth in all areas to make us one of Australia's leading providers of business and financial advisory services for high net worth individuals, business owners and organisations.

An exciting opportunity has arisen for an Associate Advisor to join our progressive and innovative team in Sydney. You will be working directly with a Senior Advisor in a fast-paced role within a joint-venture relationship with a sizeable CBD based accounting practice. Your interactions will be predominantly with High Net Worth individuals and the rate of growth within the business will provide you with ample opportunity to progress.

Why we exist

We exist to help Clients, Partners and our People to unlock a world of possibilities to surpass their financial and lifestyle goals. We have experienced impressive growth over the last few years, through our unique positioning in being able to provide clients and referral partners with a seamless broad-based service offering which meets their financial and business needs – whether it be a financial advice, superannuation, legal, estate planning or lending matters. We are always interested in passionate professionals keen to make a difference in their clients' lives.

About the role:

As the Associate Advisor you will be responsible for performing the tasks that comprise the implementation and ongoing administration of clients' financial strategies. Working closely with the Senior Financial Adviser you will be required to:

- Liaise directly with clients
- Provide quality service and maximize customer satisfaction
- Manage the implementations of new investments and insurance policies
- Maintain accurate data and records
- Produce client correspondence and reports (with support from in-house para-planning)

Our ideal candidate:

- Will have a moderate level of technical knowledge and a genuine interest in advancing your career to become a Financial Advisor
- Will need excellent relationship management and administrative skills
- Thinks outside the square and constantly looks for better ways of doing things
- Will need great energy and be highly motivated to achieve growth and meet deadlines

- Will need excellent people skills and be able to network internally and externally to build relationships with accountants, advisors and other clients

To apply for this exciting opportunity please email your cover letter and CV to:
Lyn Mellsop - Human Resources, Partners Wealth Group: lmellsop@pwg.com.au.

Please note, only shortlisted applicants will be contacted.