



Client Associate - Commercial

Partners Wealth Group, Melbourne

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.

About the Role

Partners Wealth Group (PWG) has an exciting opportunity for a Lending associate to join our team.

Why is this exciting? As a Lending associate at PWG, you will play an integral role in the support of our Lending Advisors and be exposed to almost the entire brokering process. Lending associates have a core focus on client care and relationship management. These are essential functions for embodying the core values of the Lending team, which includes maximising client satisfaction. This outcome is essential to the wider PWG business model, as the vast majority of clients come from referrals within the company. This attitude has resulted in high client retention, so if you're someone who loves relationship management and is detail orientated while working at pace, you'll be a great fit.

As a PWG Lending associate, you will be a primary interface between the clients and financiers once the optimal loan structure has been determined by our Lending Advisors and agreed with by the client. This role involves assisting the client through to the settlement of their loan application. You will be responsible for managing ongoing client relationships from the pre- approval stage, by identifying individual client needs and servicing those needs in a manner which ensures value to the client.

Our ideal candidate

- Bachelor degree preferable
- Would suit someone completing finance/accounting degree, or with a banking background
- Genuine interest in advancing your career within the Lending industry

- Has excellent relationship management and communication skills
- Has a passion for personal growth and a sincere desire to assist clients with achieving their goals
- Great energy and highly motivated to achieve growth and meet deadlines

Our Culture:

Partners Wealth Group have been recognised in the Top 10 AFR BOSS Best Places to Work Awards in 2022.

- Fast paced and client focused
- Accelerated Training & Development
- Genuine and friendly team environment
- Great office space; and
- Good social network

Apply now and find out why we are a great place to work!

To apply for this exciting opportunity please email your cover letter and CV to:

James Thompson - Partners Lending General Manager, JThompson@pwg.com.au

Please note, only shortlisted applicants will be contacted.