PARTNERS
WEALTH GROUP

PRIVATE WEALTH MANAGER

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.

Why do 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 who are keen to make a difference in their clients' lives.

About the role

The Private Wealth Manager is responsible for the development and implementation of stakeholder liaison, revenue growth, operational processes, and business development for the Partners Private wholesale arm of Partners Wealth Group.

The role is responsible for the day-to-day management of the business, completion of wholesale investment raises and managing key relationships across the clients, aligned referral partners, financial advisors, and investment houses.

This includes designing effective processes and procedures, workflow management, project management, training and education of stakeholders, practicing compliance and the effective use of available resources.

About you

You will have previous experience working in a financial services environment and have a track record of success in delivering business growth across both new clients and revenue streams.

- Minimum 4 years' experience, ideally within financial planning
- Strong Wealth and/or investments background
- Have worked on projects that are separation or M&A in nature
- Strong sense of initiative, be highly proactive and be able to deal with ambiguity
- Demonstrate well-honed communication abilities, both written and verbal
- Ability to effectively engage and influence a broad range of stakeholders

Our ideal candidate

- FASEA relevant degree or working towards
- Advanced Diploma Financial Planning / Financial Services or equivalent
- >5 years' experience in financial services
- Experience in the provision of financial advice to target clients, specifically high net worth
- Business development skills and developed networks

Our culture

- Fast paced and client-focused
- Accelerated training & development
- Genuine and friendly team environment
- Great office space
- Good social network

Why wait? Apply now and launch your career at Partners Wealth Group!
To apply for this exciting opportunity please email your cover letter and CV to:

Todd Synon – Operations Manager, Partners Wealth Group: TSynon@pwg.com.au

Please note, only shortlisted applicants will be contacted.