



Position description

Position details

Role	Operations Support
Position status	Permanent, fulltime. To note: there is some flexibility available in this position
Reporting to	General Manager

About Bombora

Bombora Advice Pty Ltd was formed in July 2013 by a group of like-minded financial advisers who wanted to establish a privately owned, advice led offering.

This unique offering has attracted some of the leading national advice practices with over 100 Professional Service firms aligned to our business.

Bombora holds the AFS licence (AFSL 439065) under which network members are authorised to run their financial services businesses. As the holder of the AFS licence, Bombora provides its member firms with a range of training, compliance, technology and system services to ensure that regulatory matters are adhered to; that advisors professional development is advanced and that client advice and service remains our focus.

Bombora's mission is to provide clients with the highest level of professional risk advice. For clients and associated businesses of Bombora this process delivers exceptional ongoing results; from advice preparation, advice delivery and client service.

We are seeking an experienced administrator to join our team. To be successful in this role you must have a minimum of four years' experience; have the ability to work autonomously and as part of a team; the ability to multi task and want to work in a fast-paced, friendly environment. Experience in the financial services sector is required, risk insurance experience well regarded.

We have created a positive, supportive and flexible workplace for our team; we are proud of our achievements and want our team members to be as excited as we are about our work.

Key Responsibilities

ADVISER AND THIRD PARTY SUPPLIER RELATIONSHIPS:

- Coordinate the onboarding process of new advisers & practices
- Manage relationships with third party software (financial platform) suppliers – Enzumo, Revex and XPlan ensuring legislative compliance and updates maintained within the Bombora system
- Coordinate and assist Bombora practices on commission revenue related enquiries

GENERAL ADMINISTRATIVE DUTIES :

- In conjunction with the General Manager assist in creating and updating marketing collateral using branded templates
- Assist in the further implementation of the organisation's management systems including the update of policies, procedures and forms and continuous improvement of same
- Upload and administer information on our website and intranet as required
- Coordinate the distribution of materials and communications within the group
- Coordinate the distribution of Board papers
- Perform data collection and collation for reporting purposes
- Take minutes of meetings as required
- Ensure upkeep of record management
- Perform some AR and AP duties as required
- Respond to and assist with other admin tasks as directed

EVENTS:

- Professional Development day co-ordination
- Board meeting coordination
- Bombora conference coordination
- Organise all other functions as required

PERSONAL ASSISTANT:

- Perform PA duties for the CEO, GM and Compliance Manager as required

Some travel may be required in this role

Key Selection Criteria

You will play a key role in a small corporate office team. The successful applicant will be a highly dynamic individual who is experienced in a variety of administrative duties. There is opportunity for this role to develop and grow as the organisation does, so the right fit for us from both a capability or organisational cultural viewpoint is crucial.

The must haves:

- Demonstrated experience in a similar role/similar environment
- Experience in the financial services sector
- Proficient in Microsoft office and/or Google Suite
- Great attention to detail and accuracy
- Ability to adapt to the varied tasks required within the role
- Demonstrated ability of being pro active in your role
- Excellent customer service skills

Key Performance Indicators

- Take ownership of all components of the role
- Prepare all work with a high degree of accuracy
- Work cooperatively as part of the corporate team and overall/larger Authorised Representative team
- Contribute positively toward the culture of the organisation

Remuneration

Dependent upon experience.

Start Date

Immediate.

Application Process

Applications close 17 June 2018.

Please email applications, addressing all criteria to:

careers@bomboraadvice.com.au

Interviews will be conducted the week of 18 -22 June.

Three referees will be required at interview.

