Role Purpose Statement

Role title:	Senior Analyst
Division:	JBWere
Team:	Advice
Role reports to:	Senior Business Manager – [VIC, NSW, ACT & QLD or WA & SA)
Group (1 to 7):	Level 2
Purpose:	The Senior Analyst is responsible for coordinating Adviser team(s) to successfully service clients, by providing outstanding administrative support, increasing team efficiencies and meeting all compliance obligations. The Senior Analyst must have a strong focus on client communication and engagement to support the generation and retention of team revenue. .
Accountabilities: A list of the key responsibilities of the role, detailing what the role is accountable for	• Service existing client relationships and maintain an excellent and consistent client experience. • Demonstrate a good understanding of, and be able to communicate, financial market updates, investment ideas and asset allocation. • Accurately execute trades as instructed by Adviser Team/s and in accordance with your LOA provisions. • Production of SOA's (Statement of Advice). • Production of pitch documents and marketing material. • Establish and maintain client accounts. • Monitor and maintain the Sophisticated Investor Register, Account Categorisation, Client Risk Profiling and Statement of Advice (where applicable) to ensure all compliance obligations are met. • Proactively manage risk and compliance though performing and adhering to policies, processes and procedures, and escalating any events, losses, breaches as incurred. • Management of the team/s prospects and opportunities, ensuring Salesforce is up-to-date, and providing the advice team with reporting as required. • Assist in the management of IPO's, Placements and other capital raisings, including client allocation, provision of client documentation and efficient settlement to ensure advice team/s meet commitment. • Mentor Analysts across the business. • Liaise with Operations as required to facilitate workflow. • Co-ordinate team/s client and prospect events to support client retention, acquisition and cross referral opportunities. • Drive the advice team/s to execute and deliver business-wide initiatives and opportunities to achieve desired outcomes. • Support continuous improvement in our business through the Kaizen process. • Maintain a high level of administrative support to the team/s.

Competencies:	• Demonstrated experience and strong performance in a Senior Analyst role. • Excellent written and verbal communication skills. • Strong interpersonal and rapport building skills. • Attention to detail with good numerical and analytical skills. • Proficiency in Microsoft Office (Excel, Word, Outlook & Powerpoint) • Ability to manage and meet expectations and timeframes. • Demonstrate an understanding and interest in financial markets. • A good working knowledge and understanding of the financial services industry and regulatory environment.
Educational Requirements:	• FASEA accredited AQF7 Bachelor Degree or FASEA approved post graduate tertiary pathway qualification • Tax (Financial) Adviser current registration • Approved Industry Association professional membership • RG146 • Completion of the Analyst Program
Future Role Options:	• Associate Adviser • Business Associate