

# ROLE PURPOSE STATEMENT – PW OPS ASSOCIATES-CURRENT

Position	Reports to	
Associates, PW Operations	Team Lead, PW	
Division	Operations	
Business & Private	Group 2	
Purpose	Capabilities, Experience & Qualification Requirements	
<p>Private Wealth (PW) Operations has a parallel team structure supporting JBWere (JBW), NAB Equity Lending (NEL) and NAB Trade (NT) businesses. The function-based consolidation of teams is aimed at promoting simplification, reducing risk and improving productivity across PW Operations.</p> <p>The Associate role will be pivotal in assisting the team as an SME to complete tasks and daily BAU.</p> <p>Critical to success of this role will be extensive knowledge in assisting of functional expertise across JBWere, NEL and NAB Trade businesses , Ensuring all allocated BAU activities are completed accurately and within SLA's.</p>	<p><u>Essential capabilities</u></p> <ul style="list-style-type: none"> <li>Exception Management and attention to detail</li> <li>Ensuring Completions and authorising of the daily task</li> </ul> <p><u>Other capabilities</u></p> <ul style="list-style-type: none"> <li>Actively contribute to the team's process improvements</li> <li>To identify and escalate any issues, problems or risks identified to the TeamLeader</li> </ul>	<p><u>Experience</u></p> <ul style="list-style-type: none"> <li>Operations experience</li> <li>Demonstrated subject matter expertise</li> <li>Excellent problem solving skills</li> <li>Good stakeholder management skills</li> </ul>
	<p><u>Qualification Requirements</u></p> <ul style="list-style-type: none"> <li>Preferred tertiary qualified with a relevant degree</li> </ul>	
Key Decisions	Key Accountabilities	
<ul style="list-style-type: none"> <li>Review and prioritise BAU activities along with problem solving and investigations of adhoc issues</li> <li>Proactively monitoring risk and assurance requirements within agreed Risk Appetite and managing non-compliance in a timely manner</li> </ul>	<ul style="list-style-type: none"> <li>Completion of daily BAU and reconciliations</li> <li>Follow up and resolve any issues with daily BAU</li> <li>Ensure all allocated BAU activities are completed accurately and within the SLA</li> <li>Actively contribute to the team's process improvements</li> <li>Actively participate in project /BVT and UAT ,when new products are introduced</li> <li>Ad hoc tasks as directed by the Lead and Managers</li> <li>Raise and escalated Incidents when required</li> <li>Update and review procedures</li> <li>Provide training to Team Members</li> </ul>	
Key Stakeholder Groups	Key Performance Indicators	
<ul style="list-style-type: none"> <li>JBW Advice &amp; SDW Front Office</li> <li>Private Wealth Operations Teams</li> <li>NEL account mangers</li> </ul>	<p>Proactively manage Daily BAU and SLA's</p> <ul style="list-style-type: none"> <li>Contributing in meeting compliance and control requirements</li> <li>Contribution to continuous process improvement</li> </ul>	