



Role Purpose Statement

Role title:	Analyst
Division:	JBWere
Team:	Advice
Role reports to:	Senior Business Manager – [VIC, NSW, ACT & QLD or WA & SA)
Group (1 to 7):	Level 1
Purpose:	<p>The Analyst is responsible for supporting a team of Advisers to successfully manage and develop their business, by providing exceptional administrative and marketing support.</p> <p>The Analyst must have a strong focus on adding value to the client relationship by building rapport and developing outstanding client engagement and communication.</p>
Accountabilities: A list of the key responsibilities of the role, detailing what the role is accountable for	<ul style="list-style-type: none"> • Provide a high level of administrative support to the team/s and respond to client queries in an efficient and effective manner. • 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 through 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 team/s in preparing Statements of Advice (SOA), pitch documents, portfolio reviews and marketing material. • Arrange and manage the team/s schedule and team events as required. • Provide factual market and economic information in accordance with your Letter of Authority (LOA). • Liaise with Operations as required to facilitate workflow. • Support the advice team/s to execute and deliver business-wide initiatives and opportunities to achieve desired outcomes.
Competencies:	<ul style="list-style-type: none"> • Excellent written and verbal communication skills • Strong interpersonal and rapport building skills • Experience in a professional services environment • Proficiency in Microsoft Office (Excel, Word, Outlook & Powerpoint) • General understanding and interest in financial markets



Educational Requirements:

- RG146

*Please note for those looking for career progression in Advice the below is mandatory:

- FASEA accredited AQF7 Bachelor Degree or FASEA approved post graduate tertiary pathway qualification
- Tax (Financial) Adviser current registration
- Approved Industry Association professional membership

Future Role Options:

- Senior Analyst