

Position title	Specialised Accounts Officer
Division	Customer Enablement - OPS
Department	Specialised Account Operations
Direct Reports	No

Our culture and values

We have a clear strategy and important work in place to become Australia's bank of choice.

Our values of **teamwork**, **integrity**, **performance**, **engagement**, **leadership** and **passion** are at the core of who we are and form the expectation of the behaviours we adopt every day.

We strive to have a culture that drives balanced outcomes; is open and informed for disciplined execution; that celebrates and recognises success; and where the sum is greater than its parts. To achieve this, we focus on four critical behaviours: **act commercially**; **move fast to help customers achieve their goals**; **recognise people for their impact**; and **actively challenge the status quo**.

Together, we're creating a culture we can continue to be proud of; one that will help us reach new heights.

ROLE PROFILE

Your division, your team

The objective of the Customer Enablement Division is to provide frontline relationship support and service and develop strong and sustainable partnerships to a wide range of customers and partners.

The Operations, Processing & Servicing (OPS) function contributes towards this vision by developing and executing strategies which will deliver our products and services to our customers in an efficient and cost-effective manner. A culture of operational excellence underpins this, with the delivery of a highly efficient and robust operational platform impacting the experience of our customers and partners, which in turns delivers to the customer value proposition.

Our role is to provide our stakeholders with a range of services supporting Consumer & Business Lending, Deposit & Wealth Strategic Objectives, and Loan & Deposit Servicing functions.

The Specialised Account Operations Team is responsible for providing professional, timely and high-quality administration support in assisting the Consumer & Business Banking network achieve Know Your Customer (KYC) compliance, by reviewing and On-Boarding all Non-Individual Customers.

The purpose of your role

The Specialised Accounts Officer is responsible for providing information, guidance, and support to the Consumer & Business Banking Network. Applications are received and completed within allocated time frames.

The Specialised Accounts Officer works collaboratively with their leader, peers, and other stakeholders to ensure that all Non-Individual Customer accounts are opened effectively, efficiently and in line with customer expectations.

Your core relationships

Reports to: Team Manager Account Support - Specialised Account Operations

Nil direct reports

What you're accountable for	
Productivity	<ul style="list-style-type: none"> • Achieve set individual daily / monthly productivity targets or measurements. • Action Non-Individual Customer account opening requests from our Consumer and Business Banking network to ensure KYC compliance. • Provide support for our Consumer and Business Banking networks in relation to new Non-Individual Customer On-Boarding procedures. • Assist other team members as required.
Quality	<ul style="list-style-type: none"> • Meet any agreed quality / error targets.
Risk	<ul style="list-style-type: none"> • All personal mandatory risk training is completed by the due date. • Operate within personal approved limits (with no breaches of those limits) without authorisation from the appropriate oversight body, for the policies of: <ul style="list-style-type: none"> - Delegated Lending Authority - Consecutive Annual Leave - Group Authorities Register • Report any concerns, loss events or incidents of non-compliance to your BURA/Line Manager. • Compliance with all Bank policies. • Contribute to the overall reduction of risk levels associated with the KYC function to appropriate levels that fit within the Bank's framework
General	<ul style="list-style-type: none"> • Undertake special projects and other duties from time to time and as directed. • Assist with other tasks as and when requested. • Proactively provide assistance and share your knowledge with other team members. • Work in co-operation with colleagues to achieve team and business objectives.
Bank Values & Community	<ul style="list-style-type: none"> • Consistently demonstrate behaviour in accordance with the Bank's corporate values and policy requirements. • Continually support and contribute to the OPS Division strategy. • Be actively involved in community activities supported or initiated by the Bank and work with other areas of the Bank to support existing community initiatives and identify new opportunities.

Your knowledge, skills and experience	
Knowledge & skills	<ul style="list-style-type: none"> • Thorough understanding of account opening and current legislative requirements. • Excellent communication and relationship building skills. • Proactive, innovative and prepared to go the extra mile to deliver exceptional customer service. • Energetic, enthusiastic and co-operative. • Demonstrated ability to work within tight timeframes with the ability to prioritise. • Able to work effectively in a team environment or autonomously. • High level of literacy skills. • Highly accurate approach with strong attention to detail.

	<ul style="list-style-type: none"> • Ability to communicate in a positive and professional manner • Ability to prioritise, monitor and organise workflows • Microsoft experience: Outlook, Word, Excel - intermediate level preferred. • Working knowledge of Banking platforms RFS, Doxgate, BPM or similar systems preferred.
Relevant Experience	<ul style="list-style-type: none"> • Proven understanding of a wide variety of the Specialised Account Opening legal requirements as well as relevant Bank Policies and Procedures (preferred)

Your qualifications and certifications

FSRA Tier 2 accreditation - Deposit Taking and Non-Cash Payment Facilities and General Insurance Certificate III in Financial Services (preferred)

Risk responsibility

Ensure all work practices are conducted in accordance with all Bank compliance requirements, as specified in Bank policy, corporate and business unit procedures and identify and report instances of non-compliance to appropriately.

CAPABILITY PROFILE

Key people capabilities

Relationships	Results Focus
Grow Self	Role Expertise

People capability profile

Relationships Builds and maintains productive relationships with trust and integrity. Works collaboratively and is open to the perspectives of others.	Results Focus Sets and manages relevant goals. Is mindful of and responds to the business environment. Asks for help and reviews for learning.	Grow Self Grows knowledge, is curious and proactively applies learning. Builds resilience and is mindful of impact on others.	Role Expertise Maintains role-specific standards and applies knowledge, skills and experience on-the-job.
Intermediate Communication Effectively expresses thoughts, ideas and information. Actively listens and adapts communication style. Engages, influences and connects to our purpose to tell our story.	Foundational Execution Makes well-considered decisions, plans and delivers quality outcomes. Problem solves and acts with integrity. Holds self and others accountable.	Foundational Grow Others Develops others by sharing feedback, recognising and celebrating outcomes. Connects with others to guide, empower and inspire.	Intermediate Customer Focus Identifies customer goals, makes relevant recommendations and takes appropriate timely action. Collaborates across the business to deliver best outcomes for the customer.
Intermediate Partnering Acts with intent to build sustainable partnerships with customers, community and stakeholders to deliver shared value and achieve business outcomes.	Intermediate Innovation Constructively challenges the status quo and offers alternatives. Seeks to improve ways of working and is open to new ideas and experiences.	Foundational Future Ready Exchanges and respectfully challenges perspectives and approaches. Anticipates, embraces and promotes change to achieve our vision for today and tomorrow.	Intermediate Commerciality Applies understanding of finance, risk, people and customer for decision-making to deliver business sustainability. Takes appropriate risks and acts in the best interest of the Bank.
Foundational	Foundational	Foundational	Foundational

Role motivators

Achievement	Gaining a sense of achievement, closure; seeing something through to completion; working towards attainable goals.
Growth	Having opportunities to acquire knowledge, learn new skills and improve own performance
Variety	Performing a variety of tasks and activities on a regular basis