



financial advice makes a difference

Albury Office
566 Kiewa Street
Albury NSW 2640
PO Box 1281
Albury NSW 2640

Telephone: 02 6041 2122
Facsimile: 02 6041 3021

www.bridges.com.au

About our company

Bridges Financial Services has operated in Albury for 25 years, providing financial planning, superannuation strategies, retirement planning, stockbroking, investment strategies and personal insurances. We are a team of 11 currently, across offices in Albury and Wagga Wagga. We enjoy working in a relaxed, informal but professional environment.

Our core values

Respect & Teamwork

- Working together for common goals. We share workloads, knowledge and support each other to get the job done.

Quality in Execution

- Do it once, do it well.

Integrity

- Our word is our bond – we do what we say.
- We are loyal to each other.

Excellence

- We are dedicated, committed and passionate about what we do and take pride in a job well done.

Critical Review

- Unrelenting pursuit of excellence.

Outstanding

- Supplying the resources and physical environment that brings out the best in people.

Treat everyone with fairness, respect and dignity.

Place the client's needs first.

About the role

A long-serving, highly valued staff member is about to retire so we're looking for her replacement. With a number of changes on the horizon, we need to ensure the transition is managed with minimal disruption to our clients and our team. We're looking for someone who adapts well to a changing environment and who can assist us with the transition, co-ordinate the admin team, help the planners with their workflow as well as undertake client service work.

Above all, we want someone who is that magical blend of being highly organised, confident and empathetic. We want to get things done, and we also want to maintain a warm and inviting professional space for both clients and our team.

You need to be someone with a natural bent for thinking ahead and prioritising, who is able to think outside the square, and work with the whole team to ensure things get done.

We want a person who will take responsibility for and pride in their work. You must be meticulous in your attention to detail, including having strong literacy (including spelling) and numeracy. You will need sound computing skills and be proficient in using Work, Excel and Powerpoint.

In working with people, both clients and colleagues, we want you to be confident, friendly and kind.

A background in financial planning would be highly advantageous. We are looking for a person who is a self-starter with the drive to keep learning and improving.

Naturally, in our business, trustworthiness, discretion and confidentiality are absolutely essential. The successful candidate will be required to have a national police check before a job offer is confirmed.

A couple of important things to note:

1. An essential part of your induction will be provided in Sydney over 2-3 days, so you would need to be able to be away from home for that period of time.
2. There is a conference in Sydney every year, usually in September, that you will ideally be able to attend as part of your professional development.
3. If you are trading shares, this must be done through Bridges to conform with our staff trading policy under ASX rules. Please discuss this with Mark Fisher prior to applying, if you have any questions or concerns.

The salary and working hours

The position is full-time, working weekdays generally from 8:30am –5pm. You may choose to work your hours in such a way that you can have a rostered day off each month.

The salary is \$56,290 per annum (\$28.49/hour) + 9.5% superannuation.

Award: Banking, Finance and Insurance Award 2010 [MA000019] Level 6

How to apply

If you are interested in the position, please send your written application and resume to ellyn@businessgrowthstrategies.biz by 4pm on Saturday 13th April.

Please note: your application must address each of the selection criteria individually. Make sure you address both the essential AND desirable criteria.

Selection Criteria

Essential

1. Substantial experience in a combined reception and administration role, including experience with meeting compliance requirements, client file management and general financial processes such as revenue reporting, petty cash, banking and invoicing;
2. Demonstrated experience in coordinating a team of staff and maintaining a high level of team satisfaction, teamwork and efficiency;
3. Demonstrated ability to communicate clearly and concisely;
4. Demonstrated high level organisational skills and ability to think ahead, prioritise, problem-solve and work to deadlines;
5. Exceptional accuracy in work outputs (including spelling, data entry, professional correspondence etc);
6. Strong computing skills, including Word, Excel, Powerpoint, internal diary management, use of email and internet;
7. Experience working with confidential information;
8. Demonstrated willingness to be hands-on and share the humble but necessary tasks associated with an office.

Desirable

1. Experience in a financial planning setting.

Additional information about our recruitment process

The recruitment process is being managed for us by Ellyn Martin from Business Growth Strategies.

- Ellyn will do an initial shortlisting of applicants based on written responses to the selection criteria;
- Those who are unsuccessful at this stage will be advised by email;
- Ellyn will conduct a brief (30 - 40 min) telephone interview at a mutually agreed time to further shortlist applicants;
- For applicants selected to proceed to interview stage, there will be a face-to-face 90-minute interview;
- ***The interviews will take place on Thursday 2nd May at Bridges Albury, 566 Kiewa St Albury.***
- Applicants who are invited to a face-to-face interview will be asked to undertake a short (10 to 15 minute) online Talent Dynamics profile assessment prior to the interview (instructions will be provided);
- Following the interview, the preferred candidate/s will be asked to provide the names and contact details of 3 - 4 referees, including someone from their current place of employment (if applicable). We will discuss with you who we'd like to speak with.
- The successful candidate will have a 6-month probationary period.

If you need more information about the role, please contact Mark Fisher on 02 6069 9311.

If you need more information about the recruitment process, contact Ellyn Martin on 0412 375 760 or ellyn@businessgrowthstrategies.biz.