

## Client Relationship Officer

### We offer our staff a number of great benefits, including:

- Purchase additional Annual Leave
- Gym reimbursement program
- Additional Leave options
- Study assistance

### Your new company

Bank First, formerly Victoria Teachers Mutual Bank, is a customer owned bank that exists for the sole purpose of providing better banking experiences for customers; not to serve shareholders. Due to growth in the department, we are expanding our workforce planning team to ensure our new and existing customers continue to receive the expected level of service.

### Your new role

Reporting to the Senior Paraplanner, you will be responsible for providing service to, and fostering our relationship with Financial Planning clients. The occupant of this position is responsible for timely and accurate implementation of advice recommendations and production of advice documents as required.

### What you'll need

To be successful, you will have previous experience in Financial Planning with excellent interpersonal and communication skills, coupled with exceptional customer service experience. Experience with MS Word and Excel and financial planning software.

You will have a Diploma of Financial Services, and be willing to undertake continuous and/or refresher training when required. Desirable to have the Advance Diploma of Financial Planning.

### What you'll get in return

This exciting opportunity will see you working for an awarding winning organisation, with a competitive salary package and a broad range of other benefits reflective of our healthy culture and engaged workforce.

### What you need to do now

To be considered for the role, please send your CV and covering letter addressing the above criteria to [jobs@bankfirst.com.au](mailto:jobs@bankfirst.com.au).

**Applications close:** Friday 18<sup>th</sup> January

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AFSL/Australian Licence Number **240 960**