

## Paraplanner

### 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 Head of Financial Planning, you will be responsible for the provision of paraplanning services. This includes the analysis of circumstances through technical calculations and advice, to ensure the appropriateness of a proposed strategy and the creation of a compliant Statement of Advice. This role supports the operations of our Senior Financial Planners in the provision of advice and preparing advice documents.

### What you'll need

You will have a minimum of 2 years' experience in Financial Planning and be proficient using COIN Financial Planning software as well as other relevant industry software. You will have excellent customer service and communication skills, and your high level of interpersonal skills will enable you to succeed in this role.

You will be qualified with a Diploma of Financial Services with the view to obtain an Advanced Diploma of Financial Services and be willing to undertake continuous refresher training when required.

### What you'll get in return

This exciting opportunity will see you working for an award 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 17 Jan 2020**

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