Capital Partners

Title	**Associate**
Job Details	Full time or Part time, Capital Partners office (22 Delhi Street, West Perth)
Supervisor/ Manager	Senior Associate Adviser
Position Purpose	The Associate is part of the Associate Support Team and is primarily responsible for supporting the advice team. They work closely with the Associate Advisers and Client Service Associates to prepare documentation, source accurate data and maintain records to ensure we consistently deliver positive client outcomes. They do not have responsibilities for an allocated client base but you may be aligned to a team in some circumstances.

LIVING THE CAPITAL PARTNERS CULTURE

Our purpose is to help our clients and team explore what's possible and achieve bigger futures.

We are driven by performance and led by values.
Our values are our code of conduct and define our culture and who we are as people today.

Our Values

Think Beyond Ourselves	Genuinely care for people Listen and act with heart Service above self Help, go the extra mile
Do the Right Thing	Do what you say Take responsibility Be open, honest, and fair Have conversations that matter
Live Above the Line	Have a growth mindset Commit to learn and grow (yourself and others) Bring your best Look for better ways to do things
Play as One Team	Lean into challenges together Speak up, participate and collaborate Play to your strengths Ask for help when you need it

Key Duties and Responsibilities

1	Ownership of client administration to support the Advice teams, including but not limited to on-boarding of clients, document management, data entry and searches, reception cover and follow up calls;
2	Liaise with product providers and undertake research of products;
3	Completion of meeting preparation for each type of meeting in line with established processes and preparation for dry runs, including compiling report packs;
4	Draft meeting summaries for review by Associate Advisers / Wealth Adviser;
5	Write and compile basic SOAs and ROAs for a variety of clients;
6	Prepare basic Xplan financial modelling;
7	Carefully maintain all client and internal records with a high degree of data integrity;
8	Attend and participate in all internal and external training; and
9	Build relationships within the broader team. More experienced associates will be required to engage in the development of the Associate support teams' technical and soft skills capability, in particular more junior associate team members.

Position Requirements

Attributes

- Basic skills in Microsoft Suite (Work, Excel, PowerPoint and Outlook);
- Clear written and verbal communication skills;
- Initiative and a willingness to get involved in any opportunity;
- Organised, with the ability to prioritise and manage conflicting deadlines;
- Demonstrated commitment to quality, accuracy and attention to detail;
- Ability to work in a dynamic environment and adapt to change;
- A proactive and analytical approach to problem solving;
- Comfortable to work autonomously with minimal supervision but collaborative where appropriate;
- Capacity to flex to a range of personalities and working styles; and
- Ability to interact comfortably with clients, team members and other stakeholders in a confident, approachable and professional manner.

Experience & Qualifications

- Completing or completed a Bachelors degree in Finance, Business, Law, Economics;
- Some form of previous professional work experience (noting experience in financial services or similar is desirable);
- Commenced or intending to commence additional studies required to meet FASEA requirements; and
- More experienced associates are expected to have foundational technical skills and industry knowledge to enable participation in discussions with Associate Advisers or Wealth Advisers.