Capital Partners

Title	**Client Service Associate**
Job Details	Full time or Part time, Capital Partners office (22 Delhi Street, West Perth)
Supervisor/ Manager	Senior Client Service Associate
Position Purpose	The Client Service Associate (CSA) is responsible for providing exceptional (and enviable) service, going above and beyond for their clients, being their point of call for all meetings, transactions and queries. CSAs are the backbone of the business and are responsible for fostering amazing rapport with our clients. They ensure the efficient running of the advice team through providing administrative support that enables the team to deliver superior client outcomes.

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	Answer the phone (direct line or overflow) in a friendly manner and assist callers with their queries, including taking a message or directing them to the relevant team member;
2	Respond to client queries in a timely manner and where it requires additional enquiry with others, ensure the client remains appropriately informed;
3	Carefully maintain all client records with a high degree of data integrity;
4	Effectively manage the diaries of the advice team to create productive client workflow;
5	Follow all internal processes and procedures as well as identifying areas of improvement;
6	Keep the team accountable by taking ownership at the team's weekly WIP meeting and following up on action items;
7	Maintain good working relationships with external providers/stakeholders including, Macquarie and other professionals;
8	Coordinate the timely implementation of advice strategies with the advice team, including transacting on client accounts with accuracy;
9	Maintain the highest compliance standards in accordance with the law, ASIC and Austrac requirements; and
10	Assist with training newer or more junior members of the team.

Position Requirements

Attributes

- Intermediate to advanced skills in Microsoft Suite (Work, Excel, PowerPoint and Outlook);
- Clear written and verbal communication skills;
- Organised, with the ability to prioritise and manage conflicting deadlines;
- Ability to work in a dynamic and fast-paced environment;
- Demonstrated commitment to quality, accuracy and attention to detail;
- Familiarity with handling matters of a confidential and sensitive nature;
- A proactive and analytical approach to problem solving;
- Comfortable to work autonomously with minimal supervision but collaborative where appropriate; and
- Ability to interact comfortably with clients, team members and other stakeholders in a confident, approachable and professional manner.

Experience & Qualifications

- Minimum 2 years' experience in an administrative role or as a CSA; and
- Experience in financial services, professional services or the legal industry would be preferable.