

Part time Paraplanner

- **Professional firm with family friendly working conditions**
- **Located Hills District, Close to public transport**
- **Part Time with Career Progression**

MTWO is a private accounting and financial planning firm with two offices located in the heart of the Hills district. Due to growth and succession a unique opportunity exists for an experience Para Planner to work on a part time basis.

Your strong commercial acumen coupled with comprehensive compliance knowledge and ability to service the existing client base whilst building client relationships will see you succeed in delivering financial planning advice and services for your clients. With a focus on Insurance, Superannuation and Investment, this private practice will provide career progression and professional development into financial planning.

The position will be responsible for:

- General client services including managing new referrals and building client relationships
- Liaison with all stakeholders including clients/underwriters/insurance companies
- Submitting applications and processing rollovers
- Undertaking product research and preparing a variety of SoAs

To be successful in the position, the applicant will demonstrate relevant and solid experience in:

- Client services or para planning
- Exposure to superannuation, insurance and investment platform applications and management
- Exceptional communication skills, both written and verbal
- An efficient approach to managing business work flow
- An ability and willingness to work independently and meet deadlines

The ideal candidate will be RG146 compliant or working towards obtaining their RG146.

In return you will be rewarded with a friendly and flexible work environment close to home and an opportunity to grow and progress within the organization as a financial planner.

Applicants must have the right to work in Australia

Interested candidate are encouraged to apply by forwarding a copy of your resume and cover letter to enquiries@mtwo.net.au or contact Monica Tatton on 9686 8166 for a confidential discussion.