

# Full Time Reception/Administration Position

This is a varied Reception/Administration role (40 hours per week)

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Duties and responsibilities include:

- ④ Meeting and greeting clients (including coffee/tea preparation for clients)
- ④ Answering and directing all incoming phone calls
- ④ Scheduling client appointments
- ④ Collecting, opening and sorting mail daily
- ④ Delivering mail to Post Office and completing any deliveries daily before 3pm
- ④ Mail outs
- ④ Photocopying/faxing
- ④ Data entry
- ④ Coordinating rotation of morning and afternoon tea for staff
- ④ Management of Tea Room and stationary supplies
- ④ General Cleaning duties and cleaning roster
- ④ Client correspondence – finalisation of plan, change of address, cover letters
- ④ Collecting client information – Transaction records, Account balances, Insurance details, Banking details
- ④ Updating client insurance policies within Fin365
- ④ Contacting clients regarding overdue premiums, etc.
- ④ Super contributions
- ④ Contacting finance organisations for client information
- ④ Management of birthday card process
- ④ Scanning documents as required
- ④ Downloading client confirmations & extracting documents
- ④ Performing electronic filing accurately
- ④ Scheduling SMS appointment reminders
- ④ General administration tasks as requested

The successful applicant must have current Microsoft Office skills, exceptional verbal and written communication skills and be of corporate presentation.

All new employees will be subject to 3, 6, 9 and 12 month trial periods and reviews.