

# Personal Assistant/ Administration Executive

Join a young, highly motivated team with a strong client focus. Modern office surrounds, boasting the latest computer and software technology, to assist the provision of quality advice and client service.

Dalle Cort Financial Services are currently looking for a professional individual to fill the role of Administration Co-ordinator/Personal Assistant to Financial Adviser.

Reporting to the Administration Manager, you will be responsible for financial planning administration duties. Other duties include; making client appointments with financial advisers, preparing information for advisers prior to client interviews, processing of client paperwork, general support to advisers, and typing and formatting of documents.

## **Successful applicants must possess:**

- Excellent knowledge in software packages, such as Microsoft Office
- Proven ability to develop & manage relationships with a diverse range of people
- A passion for Customer Service
- Strong organisational skills

## **Ideally, applicants will also possess:**

- High level of accuracy
- A professional work ethic
- Ability to achieve agreed outcomes without supervision, and work to demanding deadlines
- Previous financial industry experience would be an advantage
- Enthusiasm to learn

**To be considered for this opportunity, please submit you application including a cover letter, resume and referees to;**

**Dalle Cort Financial Services**

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F: 4721 2371

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**dallecort**  
FINANCIAL SERVICES