



# TALENT FOR BUSINESS GROWTH



<b>Website</b>	<a href="http://www.smartretirement.com.au/">http://www.smartretirement.com.au/</a>
<b>Office Address</b>	Suite 74A, 15 Victoria Avenue, Broadbeach QLD 4218
<b>Position Title</b>	<b>Financial Planning Internship</b>
<b>Purpose</b>	Support financial advisers in providing exceptional service and delivering innovative financial and lifestyle solutions for clients.
<b>Key Duties</b>	<ul style="list-style-type: none"><li>• Support financial advisers in obtaining information required for financial plans and retirement coaching</li><li>• Assist in the creation of individual financial plans for clients</li><li>• Maintain privacy &amp; confidentiality at all times</li><li>• Assist in other tasks as required</li></ul>
<b>Key Skills &amp; Attributes</b>	<ul style="list-style-type: none"><li>• Financial literacy and analytic skills, from Business/Finance studies</li><li>• Ability to quickly build a rapport with clients</li><li>• Able to explain financial concepts in ways that clients can relate to, adapting style to their background and interests, using stories and examples they can relate to.</li><li>• Ability to strictly adhere to Smart Retirement's confidentiality and privacy requirements.</li><li>• Ability to work within a highly regulated environment, preferably having studied financial risk/compliance as part of university course</li><li>• Current Police check</li><li>• Alignment with company values, including commitment to innovation and holistic approach to retirement planning</li><li>• Willingness to work with and provide support to a small team</li><li>• Excellent verbal &amp; written communication skills</li><li>• High professional standards of dress, behaviour and communication</li></ul>

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**Students:** To express your interest in this position, please APPLY NOW at [www.studygoldcoast.org.au/work/open-opportunities/](http://www.studygoldcoast.org.au/work/open-opportunities/)

**Providers:** To support your student in obtaining this position, please email [partnerships@studygoldcoast.org.au](mailto:partnerships@studygoldcoast.org.au) or contact Megan on 07 5556 6106.



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- Ability to self-manage & work with minimal supervision
- Willingness to undertake a range of tasks across the business & learn new skills
- Flexibility to juggle multiple tasks and projects
- Ability to learn on the job
- Enthusiastic & positive approach to work
- Can-do attitude
- Interested in a career in financial planning
- Experience in customer service desirable

**Software/Program  
Knowledge**

- MS Office
- Zoho (CRM)
- Slack
- Other custom and industry specific software

Training will be provided for Zoho & customer/specialist programs

**Reporting Relationship**

Reporting to David Reed (Principal) and will also work closely with other team members.

**Remuneration**

Unpaid internship

**Hours**

1-2 days per week, by mutual agreement  
Company hours are 8.30am to 5.00pm Monday to Friday.  
Hours of work can be flexible, by mutual agreement

**Additional Information**

- The internship may lead to paid casual, part-time or full-time work.
- Smart Retirement is an equal opportunity employer, valuing diversity and committed to creating an inclusive environment for all employees.

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STUDY  
**GOLD COAST.**<sup>™</sup>  
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## INTERNSHIP OPPORTUNITY

Visit [www.studygoldcoast.org.au/work/open-opportunities/](http://www.studygoldcoast.org.au/work/open-opportunities/)  
and **APPLY NOW.**

If you have any questions on this internship opportunity, please  
contact Study Gold Coast at [partnerships@studygoldcoast.org.au](mailto:partnerships@studygoldcoast.org.au) or  
phone 07 5556 6106

