

## FINANCIAL PLANNING INTERNSHIP

<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> </ul>	
<b>Key Skills &amp; Attributes</b>	<p><b>Essential:</b></p> <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> <li>- Ability to self-manage &amp; work with minimal supervision</li> <li>- Willingness to undertake a range of tasks across the business &amp; learn new skills</li> <li>- Flexibility to juggle multiple tasks and projects</li> <li>- Ability to learn on the job</li> <li>- Enthusiastic &amp; positive approach to work</li> </ul>	<p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>- Experience in customer service</li> <li>- Can-do attitude</li> <li>- Interested in a career in financial planning</li> </ul>
<b>Software/program knowledge</b>	MS Office, Zoho (CRM), Slack, & other custom & industry-specific software. Training is available for Zoho & custom/specialist programs.	

<b>Company Supervisor &amp; Reporting Relationship</b>	The role will report to David but work closely with other team members.
<b>Remuneration</b>	Unpaid internship
<b>Hours</b>	1-2 days per week, by mutual agreement, based on university requirements. Company hours are 8.30 to 5.00pm Monday to Friday
<b>Office</b>	Suite 74a, 15 Victoria Square, Broadbeach
<b>Additional Information</b>	Smart Retirement is an equal opportunity employer, valuing diversity and committed to creating an inclusive environment for all employees.

