



Position Vacant - Client Relationship Manager – Sydney Office

About us

Market leading ethical financial advice firm founded in 1989. We provide comprehensive financial and investment advice to a wide range of clients, both wholesale and retail. Our clients expect to know what their money is doing in the world, and we shape portfolios to fit their values and create positive social and environmental impact.

We are continually growing our team of professionals across our offices in Melbourne, Sydney and Canberra are now on the lookout for a new **Client Relationship Manager** in our Sydney office.

Qualifications & experience

- Minimum 2 yrs client relationship/admin experience for an advice firm
- Excellent written and verbal communication skills
- Minimum Intermediate Office 365 skills (SharePoint, Word, Excel, Planner, Teams)
- Xplan (preferred) or other financial planning software
- RG146 compliant preferred

Tasks & responsibilities

- Advice Implementation - managed fund applications, SMSF strategies
- Share trading via platforms such as HUB24, Netwealth, Ausiex, CMC Markets
- Client communication via email and phone
- Database Management - maintain client files
- Process Improvement - identify opportunities & work on solutions

Benefits

- Great opportunity to work for a growing company that supports career development
- Convenient location close to Wynard Station
- Friendly team - work with professional advisers, paraplanners and other CRMs
- 5 weeks annual leave and great work-life balance

To apply, please send your resume and a cover letter to Fiona Thomas – General Manager at f.thomas@ethinvest.com.au

If you have questions about the role, please call Fiona on 02 9413 9558.