PARTNERS
WEALTH GROUP

Job Description
Head of WA

Partners Wealth Group is a premium provider of wealth management, investment, legal, lending and self-managed superannuation services for Australians with over 2500 clients and over $3.5 billion of assets under management. Based in Melbourne with offices in Sydney and Perth, we are rapidly growing via well-established channel partners, and have a strong reputation for quality and integrity, new service propositions and a focus on providing an exceptional client experience. Western Australia is a key focus on our growth strategy with both acquisitions and joint ventures to join our existing business over the next 6-12 months, two of our Executive team are originally from Perth however we are now looking at adding senior leadership to be responsible for overseeing this growth moving forward.

Position Summary

We are looking for an energetic individual that has had proven success in building and leading teams, project and stakeholder management, business growth as well as has developed deep personal networks throughout their career. In this role you would be ultimately responsible for the delivery of our growth plans for Western Australia by assisting with the execution of both acquisitions and the commencement of Joint Venture partners whilst developing existing and new Accounting and Corporate referral sources with our Account Managers, manage new business referrals within our existing Advice team as well delivering exceptional service to our client book of 260 clients.

In addition to this your role would be to support our Director of Wealth & National Advice Manager with management of advice delivery & key talent development through our formal training and development programs.

We have a formal Pathway to Equity Program as well as structures in place should you currently have aspiration to be an owner, this also is available should you have a current business or client book that you may consider bringing into our business.

Key Responsibilities and Tasks

Business Growth & Development	• Lead and support the development of and execution of business and growth plans for our WA business and Joint Ventures. • Drive prospecting activities and conversion of leads to new business via our financial advice team. • Build strong internal network and cross-functional relationships with relevant stakeholders.
Client Service	• Support the development and implement client retention and acquisition strategies in alignment to the broader business development plan for the WA team • Ensure our local team provides exceptional client service to the existing client book and aligned businesses.
Coaching and Development	• Support our National Advice Manager with development of a high performing team including attraction, engagement, development, succession and talent management activities aligned to PWG practices • Implement existing development plans for our existing talent (future Advisors) • Support the execution of knowledge sharing within the WA team and broader PWG business
Operations & Innovation	• Support the management of WA operations with our Operations Managers. • Drive process improvement to deliver efficiencies and identification and development of tools relevant to client segment

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Risk & Compliance	• Support the effective management of risk and compliance through implementing appropriate measures, controls and activities to ensure corporate and regulatory compliance which are driven from our head office.
Team Culture	• Provide the Director of Wealth & National Advice Manager with strategic insight into the operating rhythm, morale opportunities for the WA team. • Identify opportunities to enhance cross-team operational performance • Contribute positively to the culture of Partners Wealth Group and our Core Values

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Education Requirements

- Commerce or business degree
- Advanced Diploma Financial Planning/Financial Services or equivalent (desirable)

Experience Requirements

- >10 years' experience in financial services
- Minimum 5 years financial planning specific experience (desirable)
- Experience in coaching and developing teams
- Experience in managing a team of wealth management professionals (desirable)
- Business development skills/strong networks
- Strong working knowledge of financial services market
- Excellent written and verbal communication skills
- Prioritising and time management skills and strong ability to work to deadlines
- People Management capability

Key Relationships

- Clients within specific segment
- Partners Wealth Group Partners, Joint Ventures and Accounting Practices

Reports to

Director of Wealth

Supported by National Advice Manager