PARTNERS
WEALTH GROUP

WA State Manager & Senior Financial Advisor

Partners Wealth Group is a premium provider of wealth management, investment, legal, lending and self-managed superannuation services for Australians. 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.

About the role

We are looking for an energetic individual that has had proven success in client acquisition through exceptional client experience and deep personal networks as well as has the ambition to grow a team, business as well as themselves throughout their career. This is likely to suit someone who wants to mix being a Senior Advisor with running a team of 5 others with the full support of our Melbourne head office (100 + person firm in total).

In this full-time role you would be ultimately responsible for the delivery of our growth plans for our Western Australian office and team by 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.

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 would expect that while this role would involve implementing the WA strategy, the support we have in dedicated roles would mean this individual would still be able to enjoy bringing in new clients as well as manage a client book utilizing our Advisor support teams.

We have a formal pathway to equity program as well as structures in place should you currently have a 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
- Drive prospecting activities and conversion of leads to new business
- Drive cross sell and referral opportunities within the broader Partners Wealth Group business
- 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
- Provide exceptional client service to the existing client book

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
- Supervise an Associate Advisor during their professional year
- Support the execution of knowledge sharing within the WA team and broader PWG business

Operations & Innovation

- Support management of WA operations with our Operations Managers.
- Drive process improvement to deliver efficiencies and identification and development of tools relevant to client segment

Risk & Compliance

- Lead 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

Education requirements

- FASEA relevant degree or working towards a FASEA approved pathway
- Advanced Diploma Financial Planning/Financial Services or equivalent
- Completed FASEA CPD training & development each year
- CFP is desirable

Experience requirements

- >10 years' experience in financial services
- Minimum 5 years financial planning specific experience
- Experience in the provision of financial advice to the assigned client segment
- Experience in coaching and developing Financial Advisors and Associate Financial Advisors
- Experience in managing a team of wealth management professionals (desirable)
- Business development skills/strong networks
- Strategic financial planning/advisory skills (technical and strategic competency)
- Strong working knowledge of financial services and financial planning market
- Excellent written and verbal communication skills
- Prioritising and time management skills and strong ability to work to deadlines
- People Management capability

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Our Culture

- Fast paced and client focused
- Accelerated Training & Development
- Genuine and friendly team environment
- Great office space; and
- Good social network

Applications

To apply for this role please contact Lyn Mellsop, People & Culture Manager on lmellsop@pwg.com.au