

## Job Description

# SMSF Manager

### Part-Time Position

### About Partners Wealth Group

At Partners Wealth Group (PWG) we are proud of our dynamic culture. We have and will continue to invest a lot in our people, systems and facilities and have seen exciting growth in all areas to make us one of Australia's leading providers of business and financial advisory services for high net worth individuals, business owners and organisations.

We exist to help Clients, Partners and our People to unlock a world of possibilities to surpass their financial and lifestyle goals. We have experienced impressive growth over the last few years, through our unique positioning in being able to provide clients and referral partners with a seamless broad-based service offering which meets their financial and business needs

In 2022, PWG was named as one of Australia's Best Places to Work by the AFR and certified Great Place to Work in 2024. We actively seek team members who can demonstrate how they will proactively add to our culture, and naturally represent our core values of Integrity, Excellence, Accountability, Collaboration and Resilience. We don't have timesheets, as we work together to get things done!

### Position Summary

We're looking for an experienced SMSF Manager who has a passion for SMSF and is looking to become a superior SMSF technical specialist with professional development provided through attendance at SMSF conferences and regular technical training. As an SMSF expert you will work closely with our wealth advisors to provide an outstanding SMSF client experience. PWG provides flexible working arrangements, including the option to work from home, along with a range of unique benefits designed to support your personal and professional growth while enhancing your overall work-life balance.

### Key Responsibilities

- Manage and support a portfolio of clients, providing SMSF compliance and accounting support
- Review financial statements, tax returns, and other statutory compliance documents
- Administer a range of superannuation events including fund establishment, benefit payments, pension, rollovers, contributions and fund wind-ups
- Liaise with various business units within PWG, external providers, ATO and our clients
- Provision of SMSF technical assistance with a consultative approach
- Liaise with fund auditors to facilitate the annual SMSF audit as required
- Maintain relationships and data feeds with our SMSF providers such as Class
- Gain exposure to sophisticated Wealth Management strategies
- Assist in the management of staff within the SMSF team

## **Education Requirements**

- Finance or Accounting related Degree
- CA/CPA qualified

## **Experience Requirements**

- 5+ years' experience in SMSF Management or similar roles
- Experience in the financial services industry will be highly regarded
- Experience using Class Super will be highly regarded
- Strong technical knowledge and a proven track record of success dealing with compliance and tax issues related to SMSF's
- Strong oral and written communication skills including ability to modify approach to suit various audiences
- Strong commitment to quality service and client relationships
- A genuine passion for SMSF

## **Reports to**

Head of Superannuation

## **Employment Type**

Part-Time-3 days a week