POSITION DESCRIPTION

Position Details

Position Title: Para Planner	**Business Unit:** Member Services
Position No: DP0504	**Team:** Financial Services
Classification: RBF Level 4/5	**Reports to:** Manager Financial Services
Employment Type: Full-Time, Fixed Term	**Direct Reports to this Position:** Nil
Date: January 2010	

Primary Role of Position

The primary role of the position is to provide professional support services to enable RBF-TAS Planning to achieve identified goals and objectives. Particularly this role is focused upon the preparation of statements of advice and strategies to meet client's needs.

Environment and Scope

The Retirement Benefits Fund Board administers and manages Superannuation Schemes in accordance with the *Retirement Benefits Act* 1993 and all relevant legislation and Trust Deeds. The Retirement Benefits Fund (RBF) operates in a competitive "choice of fund" environment.

The Para Planner is a member of the Financial Services Team which is situated within the Member Services Business Unit. The Member Services Business Unit is operationally divided into four areas: Member Options & Entitlements (MOE), MOE Support, Member Support and Financial Services. The overarching function of the Member Services Business Unit is to provide valued financial services to RBF members that help them plan and manage their wealth creation and retirement. Located in Hobart and Launceston, the Financial Services Team (comprised of financial planners and para-planners) provides counselling and advice services and the offer of an ongoing service commitment

The Para-Planner performs tasks within established guidelines under the general direction and supervision of the Financial Planners to achieve specific goals and objectives. Tasks are allocated to the position by the Financial Planners. The role is focused upon the preparation of statements of advice and strategies to meet client's needs. Incumbents are required to undertake study towards qualifications in Financial Planning.

It is expected that the position holds a strong commitment to conforming to and supporting a high compliance standards culture within the Financial Services Team.

While the Para Planner is expected to operate under general direction in the provision of support services and organising its own workload, there is an expectation that the position would work closely with the Financial Planners and Manager Financial Services in terms of providing regular ongoing feedback about pertinent issues and seeking guidance on recommended courses of action for any specific issues that are identified.

The Para Planner is required to achieve personal objectives, and KPIs as approved by the Manager Financial Services.

Organisational Values and Culture

At RBF we want our performance to be amongst the best. We have a set of core values that we hold to be important above all others and have identified underpinning action descriptors that are crucial to our success. Our values are **responsibility, respect, integrity, quality and achieving together**. In performing this role, you are expected to bring these values 'alive' through your daily behaviours.

You are required to comply with all relevant legislation, laws, regulations, standards, codes and RBF policies and procedures.

While at work you must take reasonable care of your own health and safety and the health and safety of other people, including people working under your supervision or direction who may be affected by your acts or omissions at the workplace, in accordance with current Tasmanian Workplace Health and Safety Legislation.

Reporting/Working Relationships

1. The position is directly responsible to the Manager Financial Services and is expected to operate under general direction in undertaking responsibilities.
2. Direction and task allocation is provided by the Manager Financial Services and Financial Planners.
3. Regular liaison and interaction with the following is required:
   - RBF Members
   - RBF Executive and staff
   - Government agency staff
   - Key external stakeholders

Key Accountabilities

The following description of accountabilities is not exhaustive and may include others as directed from time to time.

1. Timely and accurate production of tailored strategies and compliant SOA to meet client needs.
2. Team and individual benchmarks as determined by business needs and strategic objectives are met.
3. Progress towards achievement of Advanced Diploma of Financial Services (Financial Planning) and maintenance of professional development in line with industry requirements.
4. Professional knowledge is continuously updated.
5. Business practices and processes that ensure regulatory and policy compliance are continuously

reviewed and improvements implemented. 6. Effective delivery of member seminars resulting in increased usage of RBF products and services.

Selection Criteria

All selection criteria listed below are specific to this role and must be addressed by application for this position.

Qualifications, Skills and Experience

1. Significant progress towards completion of the Advanced Diploma of Financial Services (Financial Planning) or equivalent qualification. Successful completion of other relevant industry qualifications will be highly regarded.	Essential
2. Extensive knowledge and demonstrated experience in the superannuation or financial planning industries, including experience with member interviews and sound knowledge of RBF's governing and related legislation and operational policies and administrative practices **or** the ability to quickly acquire requisite knowledge of RBF products and services.	Essential
3. Excellent oral and written communication, interpersonal, negotiation and liaison skills; together with the ability to represent RBF in dealings with external stakeholders in an ethical and professional manner.	Essential
4. Demonstrated numerical, planning, organisational, analytical, and problem solving skills to support the development of value-added financial solutions for members.	Essential
5. Ability to produce accurate documentation to a high standard.	Essential
6. Computer literacy and the ability to use a range of office technology to achieve desired work outcomes. Experience in the utilisation of financial planning software or the ability to quickly acquire an understanding.	Essential
7. Current driver's licence.	Essential

Conditions of Appointment

Appointment is subject to:

- A satisfactory pre-employment police record check and National Police Clearance (less than six months old); such check to be completed prior to taking up the appointment, promotion or transfer.
- Identity validation
- Satisfactory reference checks (minimum of two required from past employment) and confirmation of the curriculum vitae/resume
- Credit and bankruptcy checks Confirmation
- Confirmation of qualifications and professional memberships
- Confirmation of Australian or New Zealand citizenship, Permanent Resident status or valid work visa

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Additional Requirements

- This is primarily a sedentary position which involves desk-based computer work, with routine bending, lifting and occasional walking between office sites.
- Intrastate travel by motor vehicle.

Verification and Approval

Human Resources

Signed by ______________________________________ Date _____/____/_______

Business Unit Executive Manager

Signed by ______________________________________ Date_____/____/_______

Review Date: _____/____/_______

Note: All position descriptions may be subject to review periodically; at the time of performance appraisal or when necessary to meet business needs. Such review may be initiated by the employee, or the employer subject to RBFB classification review guidelines.