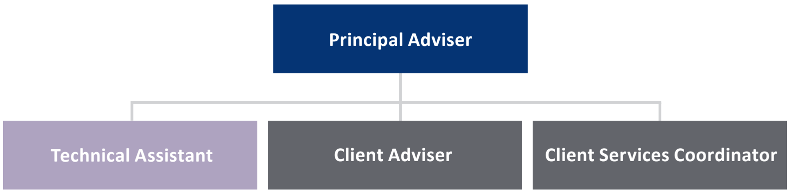

Capital Partners

Title	**Technical Assistant**
Position Purpose	The position of **Technical Assistant** primarily involves working closely with the risk insurance team to implement and review our client's insurance strategy. This incudes delivering client centric advice & meeting documentation, sourcing accurate data and maintaining records whilst also working cohesively with the broader Capital Partners' team to ensure client deliverables are always met.

LIVING THE CAPITAL PARTNERS CULTURE

We are driven by performance and led by values.

Our values are our code of conduct and confirm our commitment to the highest standards of ethics and business conduct.

Our Values

Success	We are passionate about doing the best we can for our Clients, each other and ourselves. We are ambitious and make the most of our abilities. We are prepared to work hard to achieve our goals. We achieve the right balance between organizational and personal success.
Integrity	We strive to do the right thing. Honesty, openness characterize the way we do business.
Respect	We listen, understand and respond. We genuinely care for our clients, our business and our colleagues.
Collaborative	We behave and think as One Team. We actively share knowledge, learn from each other and build consensus to work effectively across teams.
Accountable	We strive to do what we say we will do. We are clear about responsibilities and accountabilities. We take responsibility of our actions that influence the lives of our clients and colleagues.
Service	We strive to contribute before seeking reward. We are enthusiastic about feedback and constantly extend our knowledge and skills to exceed expectations and provide a superior Client experience.

Our Guiding Principles

- Act in the best interest of our clients
- Act in a way that is ethical and legal
- Base investment strategies on evidence-based methodology
- Invest to a fiduciary standard
- Compete to succeed
- Emphasise financial sustainability and think long-term
- Create opportunities for our people to contribute both to our success and their own.

Key Functions of the Role

1	An acknowledgment that we are here to serve: our clients, each other, and our community;
2	Behaving in line with Capital Partners Guiding Principles and Values;
3	Be open, honest and fair in all dealings with clients, other team members and the Company;
4	Work to grow and enhance the Company's brand and reputation;
5	Follow all agreed business procedures and practices;
6	Commit to ongoing personal and professional development including maintaining the required standards for your role through an annual professional development plan;
7	Develop, mentor and grow the capabilities of other team members;
8	Maintain appropriate standards in relation to compliance with the law, ASIC and Austrac requirements, and maintain appropriate records;
9	Deliver advice that is coherent, comprehensive, compliant and in our clients best interests;
10	Prepare meeting documentation in line with the engagement process;
11	Uphold a level of technical knowledge that assists in preparing and reviewing client strategies;
12	Have a detailed understanding of the financial planning industry and relevant legislative requirements;
13	Assist the advice team in the implementation, delivery and on-going management of client strategies; and,
14	Continual improvement and development of internal processes and procedures.

Position Requirements

Expected Behaviour

- Involvement in all meetings is proactive, constructive and respectful.
- Be able to work autonomously but be collaborative in your approach.
- Respectful and thorough handover of tasks to team members.
- The ability to prioritise and manage conflicting deadlines.
- Effective communication both verbally and in writing.
- Demonstrated initiative and self-motivation at all times.
- A proactive & analytical approach to problem solving.
- Demonstrated commitment to quality, attention to detail and accuracy.
- A desire to continually extend knowledge and skills to grow and develop.
- Ability to work in a dynamic and changeable environment effectively.
- Ability to be discreet with information.
- Ability to interact comfortably with clients in an approachable, professional manner.
- Be a natural problem solver.
- Able to work to a high standard with minimal supervision.
- Able to approach other team members respectfully and honestly.

Required Experience

- 1-2 years experience in the insurance and financial services;
- Completion or progress towards Diploma of Financial Planning, Adv Dip, CFP;
- Strong experience in managing to deadline and communicating to a team; and,
- Desire to consistently deliver exceptional outcomes.