

POSITION PROFILE

POSITION TITLE: Administration Assistant
LOCATION: Dubbo
REPORTS TO: Partner
APPROVED BY: Partner-In-Charge
APPROVAL DATE: May 2010

SUMMARY

The overall focus of this role is to ensure that the administration function within the business continues to operate in such a way as to enable the representatives to operate with total confidence of the process.

Professionally manages relations with both internal and external clients to ensure there is an effective and efficient service provided.

DUTIES AND RESPONSIBILITIES

- Relief reception welcoming on-site visitors, determine the nature of business, and announces visitors to appropriate personnel including answering incoming telephone calls, and forwarding on to appropriate personnel or respond directly and independently when possible.
- Update appointment calendars.
- Create invoices, issue receipts for payments received.
- Balance and bank payments received and conduct the banking for the Office.
- Mail – collection and sending of external and internal mail and undertake errands as required.
- Control and reconciliation of Petty Cash.
- Liaison to ensure Reception area is kept clean and tidy.
- Liaison to ensure Interview Rooms are clean and tidy and equipment is well maintained.
- Provision of word processing, Excel and work-flow management support to the group and risk advisor including typing of assessment letters to clients as required.
- Prepare, lodgement, and subsequent follow-up of all applications including liaison with clients on current status of items.
- Maintenance of client files, including timely filing of documents and archiving including maintaining and updating of client databases (MYOB AE) & XPlan.
- Liaison with other Admin Assistant, including support and training as required.
- Provide support relating to client campaigns; including the collation of data, mail merges and postage.
- Assisting in the preparation and management of presentations and seminars.



Liability limited by a scheme approved under
Professional Standards Legislation

2 River Street, Dubbo NSW 2830
PO Box 633, Dubbo NSW 2830 DX: 4016
t 02 6882 2288 f 02 6882 9421

dubbo@morsegroup.com.au www.morsegroup.com.au

BUSINESS PROMOTION

The firm is continually growing and expanding its client base, and it is inherent in the role that employees endeavor to develop the client base of the firm where possible.

SUPERVISORY RESPONSIBILITIES

There is no supervisory role in this position.

EDUCATION

School Certificate.

Computer Skills – requires basic skills in word/excel & email.

COMMUNICATION SKILLS

Ability to :

- ✓ work unsupervised, and express oneself clearly and logically.
- ✓ read and comprehend instructions, short correspondence, and memos.
- ✓ write simple correspondence clearly and accurately and easy to read.

REASONING ABILITY

Application of :

- ✓ common sense understanding to carry out simple written or oral instructions
- ✓ an ability to deal with problems within the span of responsibilities

PHYSICAL DEMANDS

The incumbent must be able to walk reasonable distances on a regular basis and must be able to lift correspondence within a reasonable weight restriction.

WORK ENVIRONMENT

Whilst performing the duties of this job, the employee is exposed to outside weather conditions.

PLANNING AND ORGANISING

An ability to

- ✓ plan and organise the day and is able to manage priorities and monitors progress.
- ✓ ensure filing is well organized and up-to-date.
- ✓ respond to specific instructions and is able to take responsibility for confidentiality.
- ✓ work with Microsoft Windows and Office products including e-mail.
- ✓ produce high quality documentation and respects the need for accuracy.

CLIENT SERVICES

Demonstrates:

- ✓ an understanding of the strategic direction of the Group
- ✓ an ability to recognise opportunities for providing additional assistance to clients arising from own work and client contact.
- ✓

PEOPLE MANAGEMENT

Contributes to the team effort and supports team members in a positive manner.



Liability limited by a scheme approved under
Professional Standards Legislation

2 River Street, Dubbo NSW 2830
PO Box 633, Dubbo NSW 2830 DX: 4016
t 02 6882 2288 f 02 6882 9421

dubbo@morsegroup.com.au www.morsegroup.com.au

SELF MANAGEMENT AND DEVELOPMENT

Demonstrates:

- ✓ an ability to achieve professional standards.
- ✓ professional standards such as reliability and adherence to the Group's values.
- ✓ a strong work ethic.
- ✓ professionalism in appearance and conduct at all times.

CERTIFICATES, LICENCES

Current Drivers' Licence.

Certificate II Business Administration.



Liability limited by a scheme approved under
Professional Standards Legislation

2 River Street, Dubbo NSW 2830
PO Box 633, Dubbo NSW 2830 DX: 4016
t 02 6882 2288 f 02 6882 9421

dubbo@morsegroup.com.au www.morsegroup.com.au