



POSITION DESCRIPTION

Role: Actuarial Analyst

Department: Wealth Management Product

Reports To: Product Manager Wealth Management

Location: Sydney

Summary

IRESS is looking for a person to fill an Actuarial Analyst position within its Wealth Management Product team. The primary objective of the role is to be responsible for the creation and maintenance of financial planning modelling tools used by end-users of IRESS' XPLAN software.

About the Position

The role will be working within the Wealth Management product group, which is made up of software product managers and business analysts. The Actuarial Analyst creates and maintains a wide range of modelling tools used by financial planners to provide taxation, asset, retirement and cash flow calculations and projections for all entity types to their end clients.

Team members are expected to have a strong sense of responsibility for delivering solutions to expectation and on time. The Actuarial Analyst is a point of specialist knowledge on financial planning strategies and is also called upon to assist senior support team members in trouble-shooting of the modelling tools within the software.

The role will also involve requirements gathering from clients, prospects and market research as well as documenting specifications.

Other Requirements

The software is used in Australia, New Zealand, South Africa and in Asia and so from time to time availability for meetings and phone calls outside of normal local business hours will be a requirement.

Key Competencies

- Demonstrable knowledge of financial planning and advice (Diploma in Financial Planning papers highly regarded)
- Tertiary qualifications in a discipline such as actuarial, mathematics or economics
- Affinity for computer based work and PC skills and demonstrable capability in financial modelling.
- Excellent organisational skills.
- Team player and diplomat.
- Ability to work in an unsupervised environment and take responsibility for decisions.
- Ability to manage competing priorities.
- Excellent communication, both written and verbal, particularly with long distance communication.
- A genuine interest in the financial advice industry and software.

Note: This position description is meant to reflect the particular attributes required at a point in time and is not meant to be definitive. The position's duties, responsibilities, competencies and other attributes will evolve or vary depending on the company's needs. In addition to the responsibilities specified here the position holder is to perform any other duties as reasonably requested.