



POSITION DESCRIPTION

Role:	Account Executive
Department:	Wealth Management Account Executives
Reports To:	QLD State Manager Wealth Management
Location:	Brisbane

Summary

IRESS Market Technology has a strong client service ethos and prides itself on being a client driven, responsive company, able to actively assist their clients by providing financial service solutions.

An Account Executive in the Wealth Management team is the primary contact for a portfolio of Wealth Management clients, developing their knowledge and use of the IRESS Wealth Management product suite, while enhancing their relationship with the company.

Key Responsibilities

Servicing/Support

- Positioned as the person who represents IRESS but can access a range of business and IT experts including consultants, product specialists, developers and senior management at IRESS to deliver the required solution/level of service to the client.
- Responsible for managing the placement of IRESS Wealth Management products, these include VisiPlan, VisiWeb, Xplan, Risk Researcher.
- Required to effectively demonstrate all IRESS Wealth Management products and solutions.
- Gain a thorough knowledge of the client's business, their requirements and expectations of the software.
- Assist clients to ensure full utilisation and maximum value of IRESS products.
- Provide training and support to existing clients.
- Comprehensively understand software, system architecture and methods of delivery that are regularly updated.
- Set priorities and meet deadlines. Maintain progress on multiple projects. Recognise and meet continually shifting priorities.
- Work closely together as a team, supporting each other on key client accounts.
- Update file notes from client discussions in the CRM system.
- Provide timely and succinct responses to client queries.

Industry information

- Maintain level of industry knowledge.
- Awareness of legislative changes and impact on the types of strategies utilized by advisers.
- Regularly attend industry functions.

Skills, Knowledge and Competencies

Technical & Practical

- Financial planning knowledge.
- Diploma of Financial Planning completion (or undergoing).
- Knowledge of IRESS software functionality and features.
- Knowledge of competitors' software functionality and features.
- Advanced Word and Excel

Human Relations

- Ability to work autonomously, yet still form part of a team.
- Willingness to share ideas and knowledge.
- Professional manner when dealing with clients.
- Strong time management skills with the ability to prioritise tasks.
- Strong written and verbal communications.
- Presentation skills.

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.