



POSITION DESCRIPTION

Role: Account Executive – Technical Services

Department: Wealth Management Account Executives

Reports To: Manager – Technical Services

Location: Melbourne

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.

We are seeking a Technical Services Account Executive in the Wealth Management team who will assist the Account Executives in mapping out the workflow management of Wealth Management clients, whilst developing their knowledge and use of the IRESS Wealth Management product suite.

This role is suited to someone who has a keen interest in technology, and is looking to develop their knowledge of the Wealth Management industry.

Key Responsibilities

- Utilise the Xplan and VisiPlan software to devise client specific templates which Practises use to manage their workflows within their business models.
- Liaise with Account Executives to coordinate the realisation of all client workflow objectives in a timely manner.
- Assist Account Executives and their clients to ensure full utilisation and maximum leverage of IRESS products.
- Provide training for the ongoing maintenance of business workflows.
- Prioritise and manage tasks on multiple projects to meet deadlines.
- Recognise and adapt to continually shifting priorities.
- Work closely together as a team by providing support to each other.
- Supply timely and concise responses to client support queries on workflow.

Skills, Knowledge and Competencies

Technical & Practical

- Advanced Microsoft Word and Excel skills essential.
- Financial Planning knowledge preferred.
- Knowledge of XML and HTML preferred.
- Knowledge of SQL and Crystal Reporting preferred.
- Knowledge of IRESS software, in particular Xplan and VisiPlan.
- Good analytical, problem solving and UAT skills.

Human Relations

- Ability to work autonomously, yet still form part of a team.
- Strong attention to detail.
- Willingness to share ideas and knowledge.
- Professional manner when dealing with Account Executives.
- Efficient time management skills with the ability to prioritise tasks.
- Strong written and verbal communication.
- Good 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.