CHARTERED ACCOUNTANTS
AUSTRALIA • NEW ZEALAND

Nick Hoogeveen
& Associates
CHARTERED ACCOUNTANT

# Position Description

## Client Systems Coordinator

***Name:***

***Date of Commencement TBA***

***Report / Responsible to: Business Manager***

**General Purpose**
This position description is designed to assist in your understanding of what is required to successfully complete the role as the firms Client Systems Coordinator. It is not designed to be a prescriptive all encompassing list of tasks.

*"To be an effective member of the Nick Hoogeveen & Associates team"*

Within the general function of this role, some specific tasks and responsibilities included in this position description may be amended by the employer from time to time, to reflect the on-going development of operational practice

# Position Key Tasks & Responsibilities

**Document Preparation, Publishing & Management**

- Prepare and process client documentation and correspondence, including minutes, annual reporting documents, financial statements and other client communications.
- Coordinate the completion and distribution of clients' annual reporting, including publishing documents to Nimbus, arranging electronic signing, monitoring completion and ensuring signed documents are appropriately filed and retained.
- Process trust administration, company administration and related governance documentation as required, including resolutions, minutes, share transfers, annual gifting documentation and associated correspondence.
- Prepare and process ACC and other general client correspondence as required.
- Maintain office forms, templates, procedure documents, policies and supporting documentation, ensuring current approved versions are available within Nimbus and are reviewed and updated regularly.
- Manage the firm's Nimbus document management and client portal environment, including user access and permissions, client and internal structures, document publishing, electronic signing workflows, templates, stationery, letterheads and document presentation settings.
- Promote consistent and effective use of Nimbus across the firm and assist staff with document publishing, signing and filing processes.
- Support continual improvement of document management processes and the efficient use of Nimbus, Microsoft Word, Excel and other relevant systems in accordance with firm best practice.
- Ensure documents are accurate, professionally and consistently presented, correctly branded and subject to appropriate version control.
- Prepare other documents, reports, correspondence, templates and supporting material for directors and staff as required.
- Undertake printing, binding or physical presentation of documents where required.

**Marketing & Publishing**

- Coordinate the preparation and distribution of client e-marketing communications, news releases and other marketing material as required.
- Coordinate and publish the quarterly client newsletter, The Adviser.
- Maintain the Nimbus home page, including publishing current notices, updates, newly available documents, resources and other relevant client information.
- Assist with advertising, marketing material and design requirements as needed.
- Maintain and update the firm's website, ensuring content remains current, accurate and professionally presented.
- Support consistent presentation of the firm's branding across client communications, publications and digital platforms.

**Client Database Management & Onboarding**

- Maintain accurate and complete client information within Client Console, including client and entity details, contact information, addresses, attributes, classifications, responsible staff members and other relevant internal information.
- Maintain accurate relationships between individuals, companies, trusts, partnerships and other entities, including ownership, trustee, director and associated-party relationships where applicable.
- Establish new clients and entities within Client Console and other relevant firm systems in accordance with the firm's client onboarding procedures.
- Ensure changes to ownership, addresses, contact details, entity relationships, responsible staff or other key information are updated promptly when identified.
- Create, amend and remove system users and access permissions where this forms part of the approved onboarding, change or offboarding process.
- Check that required onboarding documentation and system set-up steps have been completed; follow up outstanding information with the appropriate staff member or client; support the integrity, consistency and accuracy of client information across the firm's systems; and identify opportunities to improve database management and onboarding processes.

**AML Data Capture & Document Filing**

- Accurately record client AML information against the appropriate client or entity within Client Console and save supporting documentation in the correct Nimbus location, following the firm’s approved naming and filing conventions.
- Update AML records when instructed and refer any missing, unclear or inconsistent information to the person responsible for AML compliance.
- Assist with administrative follow-up for outstanding AML information when requested by the person responsible for AML compliance.

**DairyBase Liaison**

- Coordinate the provision of clients' final annual financial information to DairyBase where required.
- Liaise with DairyBase regarding queries, missing information and processing requirements on behalf of clients.
- Ensure information submitted is complete and consistent with the client's final annual reporting.
- Maintain appropriate records of information provided to DairyBase and related client correspondence.

**Administration and Support**

- Complete NHA Trust Account administration and processing as required, in accordance with approved procedures and delegated authorities.
- Provide back-up reception and client service support when required.
- Provide general administrative support to directors and staff as needed.

- Contribute positively to team workflow, communicate competing priorities early and assist other team members during periods of high demand.
- Undertake other reasonable duties within the scope of the role as requested by the directors.

## Desirable Experience, Skills and Personal Attributes

**Experience**

- Have advanced skills working with websites, database management, and client relationship management.
- Have an advanced knowledge & understanding of computers and associated general software packages in particular Microsoft Office incl. Excel and Publisher.
- Customer service & network relationships
- General office administration

**Skills**

- Competent and proficient typist
- Computers and relevant software applications
- Good spelling and command of the English language
- Good listening skills & accurate relaying of messages
- Outstanding communication skills (written & oral)
- Adhere to the requirement for accuracy and confidentiality
- Sound time management skills & efficient email management

**Personal Attributes**

- Reliable, healthy, honest
- Assertive, confident, initiative
- Integrity & discretion
- Efficient & timely
- Highly organized & adaptable
- Professional personal presentation
- Able to work along or with others
- Commitment to safe work practices
- A pleasant friendly nature
- Multi-tasking & prioritising under pressure
- Enthusiasm and a willingness to learn
- Continuous improvement focused

**Performance Evaluation**

*The performance of the incumbent will be monitored regularly by the Business Manager and on occasion the Directors. Performance will be formally evaluated on an annual basis by the Directors and discussed at the annual review.*