

Client Services Officer/Administrator

q4 financial Pty Ltd
Brisbane QLD

About the Company

q4 financial is an integrated financial services firm, with a vibrant Accounting and Financial Planning Team based in the CBD. We are a caring, values-based firm, with a team who are committed to engaging our staff and clients to 'shape their future', however they define it!

We offer a flexible working model, staff wellbeing program including financial rebate, 'q4 Giving Program', Employee Assistance Program, monthly rewards program and several fun team events throughout the year.

About you

You will possess strong attention to detail, excellent written and verbal communication skills and the capacity to think critically. You will demonstrate excellent customer service skills and a high level of integrity and a sense of pride in your work.

Loving what you do, you will have some experience but you may like the flexibility of school hours. However, you may be a school leaver with your eye on a career in administration. But the position will be highly rewarding for someone seeking to be part of a fun, caring and highly motivated accounting team.

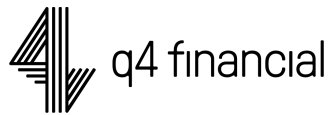
Above all, we want an individual who has values aligned to q4 – 'Our team and clients are family', 'We lead and advise with confidence', 'We challenge our team and clients to be better', 'We collaborate and share'.

About the Role

This is an exceptional opportunity for a Client Services Officer to join our team, offering flexible hours across 5 days (school hours or similar), or full time.

This position is responsible for assisting the Operations team by attending to client service and administrative requirements, specifically:

- Welcome visitors and clients to q4 financial
- Collect mail, scan and email as required
- Input and update new details into our client database and associated processes, ensuring records are stored correctly and actioned as necessary
- Ensure:
 - office is tidy, stationary ordered, our q4 café (kitchen area) is clean and well-stocked with supplies
 - meeting rooms are tidy and prepared for client meetings
- Create correspondence, reports and other documents where necessary
- Facilitate daily team 'huddle'



- ATO management eg. checking ATO communication list and draft client emails, manage ATO running balance account list, manage quarterly ATO lodgement lists etc
- Assist with ASIC management eg. updates such as share transfers, updating client details, appointment of director notifications etc
- Assist with overseeing, coordinating and updating of information for Estate Planning
- Gather information and assist with preparation monthly invoicing
- Assist with management of work in progress and ensure team timesheets are up to date
- Assist with marketing requirements as requested
- Work with the Office Manager to plan and coordinate team and client events
- Other administrative support to the professional team as required

Role requirements

To be successful in this role, your previous experience would consist of the following:

- Experience within a professional services environment or similar
- Experience with ATO portal and ASIC management (preferred)
- Computer literacy, including use of the MS Office suite and Teams
- Exposure to Xero and FYI Docs would be an advantage
- Accurate typing ability with minimum of around 60wpm
- Willingness to learn and be a positive 'team player'
- High attention to detail

Please forward your resume and cover letter outlining your availability, salary expectations and reasons for applying to our Business Manager, Sue Mackenzie-Smith at sue@q4financial.com.au.

No recruitment firms at this time, thank you.