

## POSITION DESCRIPTION

### Operations Manager

Sydney, NSW

#### WHO WE ARE

Walsh Bay Partners (WBP) is more than just a multi-family office; it is a personal institution which recognises that skills and strategy are needed to link wealth to wellbeing and helps families to thrive by inspiring future generations to maximise their potential. **We are different!**

Our family strategy planning (FSP) services help the owners of wealth to use it wisely to achieve their most important goals in their lifetime and beyond. WBP's investment strategy allows families to invest like institutions and gain access to exclusive investment opportunities that are not available to most family offices.

The FSP is at the centre of everything that we do as you will see from the following:



If you would like to know more about us then follow this link: <https://www.wbpartners.com.au/>

## WHO YOU ARE

- Someone who is **different and wants to make a big difference** to the lives of others and the broader community
- Not interested in just being an “administrator” – you want to use that brain of yours and years of experience to be an active and integrated part of a growing team of smart and like-minded people who take a holistic approach to client service and team-playing
- Fully committed – half in and half out of the water doesn’t cut it – you want to be involved in something truly intellectually stimulating and fulfilling that is executed to the highest standards in a meticulous and highly efficient manner – you want to grow with the organisation
- A pro-active, autonomous, self-starter who doesn’t need spoon-feeding and abhors being micromanaged – leave that for those that like being told what to think and do!
- Personable and passionate about people and understanding what drives them
- Interested in financial markets and the financial services industry in general
- Comfortable with ever-changing, fast-paced environments in a nimble multi-tasking team but always with an eye for simplifying and streamlining systems and processes as the team and organisation grows and evolves – there is always a better mousetrap!

If you have made it this far then you might want to also read the attachment. If you are still keen, then please give me a call:

**Stephen Ferris | Executive Director | Walsh Bay Partners Pty Ltd**

+61 (0) 414 833 021 | [stephen.ferris@wbpartners.com.au](mailto:stephen.ferris@wbpartners.com.au)

## ATTACHMENT

### PROFESSIONAL ATTRIBUTES AND SKILLS

- Embraces a culture of responsibility and accountability
- Results-oriented with strong drive and focus
- Demonstrates the highest standards of integrity and professionalism
- Highly organised with excellent written and verbal communication skills
- An innovative problem-solver who can think outside the box
- Great time management skills with the ability to manage several tasks at once and prioritise
- Ability to deal with a diverse range of stakeholders and colleagues
- Sound knowledge of the financial services industry
- Good negotiator in getting value for money on office and other costs, such as stationery supplies, printed material, accommodation and travel

### SPECIFIC ACCOUNTABILITIES & RESPONSIBILITIES

The individual will report to the WBP CEO and Executive Chairman and work closely with the Finance Manager and Advisers to seamlessly interact with clients and colleagues.

The Operations Manager's main responsibilities broadly cover two key areas: Client Liaison and Office Administration.

Tasks include, but are not limited to:

#### **Client Liaison:**

- Providing administrative support to clients, particularly in the onboarding phase, together with coordination of client portfolio performance and quarterly reviews. This will require interacting with the clients' administrative support personnel to coordinate paperwork, etc
- Acting as the main contact person for third party groups in regard to WBP funds and Approved Products (e.g. administration, custody, unit pricing, etc) and external platform providers (e.g. Evolution Trustees, TMF, BT, HUB24, Adminis, Praemium)
- Filing & maintaining client correspondence on SharePoint (internal WBP database), checking currency of wholesale certificates (for retainer clients) and annual fee reviews
- Collation of onboarding paperwork for new investors to comply with AML and CRS requirements

- Completion and collation of investor application forms
- Provide assistance with tracking capital calls, client invoices and investment commitments
- Working with the executive team (CEO, Chairman and Advisers) to prepare client presentations and newsletters

**Office Administration:**

- Coordinating team diaries, travel arrangements etc for the CEO and Chairman and the overall team
- Liaison with external IT Support and checking of invoices
- Monthly systems back-up and recording in SharePoint, reviews of Disaster Recovery arrangements
- Coordinating monthly and other internal meetings, taking notes, assisting with preparing for external compliance reviews and following up agreed action points with those responsible
- Planning and monitoring annual training plans to ensure compliance with CPE requirements and general policy awareness
- Clearing physical WBP mailbox when required and monitoring office email account
- First port of call for incoming phone calls on fixed line
- Maintaining office stationery supplies and copier requirements and ordering printed materials

**KNOWLEDGE AND EXPERIENCE**

- Tertiary qualifications in humanities or a numerate/financially-oriented discipline
- Minimum of 3 years of relevant Operations experience, preferably within the financial services industry, coupled with client service experience
- Advanced knowledge of Microsoft Office Suite - Word, Excel, Outlook, PowerPoint
- Experience with financial software and platform interfaces

**PERFORMANCE STANDARDS**

The standard of performance of the Operations Manager will be formally evaluated on an annual basis against the following criteria:

- Achieving or exceeding agreed KPIs as set periodically
- Adherence to compliance and other policies
- Effectiveness with WBP's clients, third party providers and colleagues