

Position Description

Position Details:

Position	Specialised Product Consultant
Reports To	Head of Specialised Products (Tony Di Girolamo)
Business Unit	Specialised Products
Primary Objectives	Delivery of high quality and responsive product and technical support to achieve business objectives. Contribute to the innovation, development and maintenance of the Specialised Product set to continually meet the current and future needs of investors and advisers.
Position Dimensions	Directly Supervises: 0 Budget Controlled: 0 Budgeted Sales Target: 0

Key Position Expectations:

Key Performance Metrics	
Stewardship of all Specialist Product and tax knowledge.	<ul style="list-style-type: none"> • Contribute to the innovation, development and maintenance of the Specialised Product set to continually meet the current and future needs of investors and advisers. • Keep abreast of competitor activity and regulatory developments which impact Lifeplan and competitor products. • Play a key role in the design, development, implementation and maintenance of Managed Funds Products/Services in accordance with specified Corporate and Product Strategies and within budgetary constraints and timeframes. • Conducting the compliance processes and procedures associated with the Managed Fund Product/Services lifecycle, including the Management and Due Diligence Committee processes • Responsible for the implementation of new products/services and alterations, including preparation of product specifications and organising and conducting product stakeholder meetings. Obtaining sign-off for all product deliverables from all relevant stakeholders, including: other managers; marketing personnel/agency; legal/tax/actuarial advisers; investment managers, and government authorities.

Technical (including tax) and product support to the business.	<ul style="list-style-type: none"> • Responsive, accurate, compliant and relevant. • Responsible for maintenance and development of Technical Support Materials (for training and development). • Maintain an awareness of, and communicating to relevant affected parties, specific technical information including and product features, legislation and regulatory requirements. • Strong knowledge of products and tax outcomes for investors.
Primary liaison point with research houses and dealer groups. Assist with media liaison on request.	Positive outcomes with product ratings and listings. Courteous, responsive, accurate and relevant.
Rapid response to one-to-one sales support.	Responsive, accurate, compliant and relevant.
Quality assurance on product related materials.	<ul style="list-style-type: none"> • Responsive, accurate, compliant and relevant. • Responsible for the maintenance and development of Product Disclosure Statements/Disclosure Documents. • Contribute to the maintenance and development of all support materials associated with Managed Funds Products); including Product Rules/Constitutions; Due Diligence Committee Resolutions; Policy Manuals; Technical Support Materials (for training and procedure manuals) and product marketing and promotional materials as directed. • Maintain detailed compliance files and audit trails on key processes.

Personal Attributes:

Skills	High level of tax and financial product knowledge.
Personal Attributes	Self motivated, strong communication and interpersonal skills, task driven and self motivated, possess the discipline and professionalism to work in a semi autonomous environment.
Qualifications & Experience	Tertiary qualifications and experience in the financial services industry.

Specific/Specialist Knowledge:

1. Strong understanding of the managed funds industry.
2. Strong understanding of the technical, tax, social security and legal complexities of unit trusts, allocated pensions, superannuation, funeral bonds and insurance bonds.
3. The financial planning process (including needs analysis and risk profiling) and how products can be combined in financial plans to minimise tax and achieve desired outcomes. For example, combining insurance bonds with allocated pensions.