

## Position Description

**Job title:** Transitions Consultant  
**Reports to:** Transitions Team Manager  
**Positions reporting to this role:** NA

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## Duties & Responsibilities

- Migrating information onto the Class app for SMSFs, trusts, personal portfolios, companies and other entities;
- Import completed information into Class software (Information will include but not limited to bank balances, member/equity balances, holding balances, preservation details, tax components, asset acquisition details and asset cost base adjustments);
- Review and reconcile information provided by clients;
- Complete set up actions for Data feed accounts;
- Liaise with accountholders and advisers for data feed authorisation;
- Liaise with data feed providers to activate feed accounts;
- Complete any back-filling of transactions for activated data feeds;
- Complete any of the remedial services offered by the transitions team in a timely manner when required;
- Liaise with clients and assist with the collation of information required to transition funds and/or activate feeds;
- Manage the resolution of ongoing Client issues and queries and help clients with day to day transitions issues;
- Assist with managing the resolution of outsource partners' queries and issues;
- Assist the transitions manager to prepare management reports and WIP reports for Outsource partners;
- Assist the transitions manager to maintain and improve the transitions systems, processes and tools;

## Key Performance Indicators

Colleague satisfaction as assessed by your manager, peers and associated project and support staff (this assessment may be performed either informally by interview or formally via survey subject to the applicable management processes in place at that time). The assessment will include:



- How effectively you execute your responsibilities (includes pro-activeness, responsiveness and thoroughness)
- How professionally you interact and communicate with your colleagues and clients

## **Academic & trades qualifications**

Formal degree qualifications in the area of Accounting required.

## **Work Experience and Skills**

### **Essential**

- Excellent Communication Skills & Presentation
- Intermediate to Advanced working knowledge of MS Office in particular MS Excel
- Ability to meet or exceed set KPI
- Strong administration skills and attention to detail
- Excellent written and oral communication skills
- Ability to work in a team environment

### **Desirable**

- Experience working in accounting practices or large administrators
- Knowledge of Australian Superannuation legislation and practice
- Knowledge of Class or other SMSF administration systems and accounting software
- Experience in preparing financial statements and accounts for trusts, companies and partnerships.

## **Personal qualities & behavioral traits**

- Project and process orientated
- Ability to work to deadlines
- Ability to troubleshoot issues and determine resolutions to complex issues and then communicate those resolutions to clients, team members, other staff members and other stakeholders
- Ability to share knowledge & work in a team orientated environment

## **Conditions**

- Monthly salary commensurate with industry knowledge, experience and skills
- 38 hour working week with some degree of flexibility in starting and finishing times
- Sydney based