

EXAMPLE – PROFILES, OBJECTIVES, SKILLS & ATTRIBUTES

Financial Services & Superannuation

EXAMPLE 1

PROFILE

I am a Superannuation expert with extensive experience in the administration of both accumulation and defined benefit funds. With a collaborative leadership style and a commitment to logical and practical solutions, I have a track record of success in providing excellent “member focussed” solutions and service.

My strong technical knowledge and the ability to grasp new concepts, enables me to quickly identify the key issues and work to producing quality solutions.

CAREER OBJECTIVE

Following the transfer of ABC UCA Beneficiary Fund to the Mercer Super Trust, under a successor fund transfer arrangement, I am seeking a Client Relationship Management role with a reputable and high quality Financial Services organisation. A suitable position will utilise my extensive superannuation experience as well as my managerial, problem solving and interpersonal skills.

SKILLS & ATTRIBUTES

- Comprehensive knowledge of superannuation regulations and proven record of ensuring compliance
- Preparing operational and strategic recommendations to the Board and participating in decision processes
- Highly skilled in managing relationships with members, clients and service providers
- Excellent analytical abilities in identifying business issues and solution options
- Proven ability to effectively implement and manage projects and programs according to budget and timeline requirements
- Highly competent at leading and developing small work teams and providing advice, training, professional development and support
- Advanced problem solving abilities, including the ability to analyse complex and challenging issues and find creative, workable solutions
- Reliable and committed to supporting and achieving organisational goals and initiatives
- Self-motivated with a high level of initiative and abilities to work independently or within a team environment
- Strong verbal and written communication abilities including correspondence with Members and preparation of Annual Reports and Product Disclosure Statements
- Well-developed IT literacy including the MS Office suite of programs, network infrastructure and superannuation administration platforms

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EXAMPLE 2

PROFILE / OBJECTIVE

I have had an extensive and varied career in the Financial Services Sector with Beneficiary Fund, a small superannuation fund, and previously with Australia Post. BF is currently transitioning to Mercer resulting in the closure of our office effective 30 September 2021.

I am now seeking a part-time Reception / Administration role which will utilise my broad ranging office administration experience, together with my strong communication and interpersonal abilities.

SKILLS & ATTRIBUTES

- Demonstrated ability to maintain the highest level of security and confidentiality
- Commitment to high quality service delivery to customers and members
- Excellent ability to plan and prioritise tasks in order to meet deadlines
- Self-motivated and able to work both independently and also be a strong contributor to the creation of an effective and efficient team
- Willingness to take on new tasks and responsibilities as required
- Flexible and resilient when required to adapt to the changing needs of the organisation
- Strong focus on attention to detail with proven ability to maintain accurate administrative and bookkeeping records
- Accounts payable, invoicing, banking and reconciliations
- Sound verbal and written communication including preparation of member newsletters, Board papers and secretarial correspondence
- Computer literate with sound knowledge of Microsoft Word and database maintenance
- Energetic and productive, with an outgoing manner and determination to succeed
- Conscientious, loyal and reliable