

Position Title:	Personal Assistant		
Division:	Vie Financial Devonport Pty Ltd		
Reports to:	Franchise Principal		
Number of direct Reports:	0		
Award:	Banking, Finance and Insurance Award [MA000019]		
Delegated Authority Level:	As per Authority Matrix	JD Approval Date:	March 2026
Vie Vision Statement:	To revolutionise the finance and insurance industry by setting a new standard of excellence. We aspire to be the most trusted and innovative partner, known for our client-first approach, transparency, and commitment to education and empowerment.		
Purpose and Scope:	<p>The Personal Assistant provides high-level administrative and organisational support to the Franchise Principal, ensuring the smooth and efficient operation of the office and day-to-day business activities.</p> <p>Acting as a key point of coordination, the role supports both internal team members and external stakeholders, helping manage schedules, communications, documentation and general business administration.</p> <p>The ideal candidate will thrive in a fast-paced environment, demonstrate strong attention to detail, and take pride in anticipating needs before they arise. They will be highly organised, proactive and capable of managing multiple priorities while maintaining professionalism and discretion when handling confidential or sensitive information.</p> <p>The Personal Assistant plays an important role in supporting the Franchise Principal to operate efficiently, enabling them to focus on client relationships, business growth and strategic priorities.</p>		

Job Specification

Key Responsibilities	Major Activities/Deliverables
Safety Health and Environment Management	<ul style="list-style-type: none"> Adherence to all company health and safety policies and procedures in compliance with the Work Health and Safety Act 2011 (WHS Act), including

	<p>taking all responsible steps to ensure your own safety and the safety of others.</p>
Values and Behaviour	<ul style="list-style-type: none"> • Adherence to our company values of client-centricity, transparency and trust, empowerment through education, continuous innovation, and pioneering excellence. • Adherence to the Code of Conduct. • Compliance with industry regulations and code of practice. • Maintain the Company's positive reputation by adhering to standards, expectations, and compliance requirements
Responsibilities	<ul style="list-style-type: none"> • Provide day-to-day administrative and organisational support to the Franchise Principal, assisting with the coordination of business activities and priorities. • Manage the Franchise Principal's diary, including scheduling meetings, appointments and internal planning sessions. • Act as a key point of coordination between the Franchise Principal, team members, clients and external stakeholders. • Manage incoming calls, emails and enquiries, directing them to the appropriate team members or responding where appropriate. • Welcome and assist clients and visitors to the office, ensuring a professional and positive experience. • Prepare and collate documentation including client packs, meeting materials and internal business documentation. <ul style="list-style-type: none"> ○ Assist the Property Finance Team with post-approval administration processes, including but not limited to: <ul style="list-style-type: none"> ○ Liaising with clients, lenders, conveyancers/solicitors and other relevant parties on behalf of the team ○ Preparing and directing required documentation ○ Creating and maintaining records within internal systems and third-party software platforms • Assist with the preparation of invoices and administrative documentation within Xero where required. • Manage client gifts and client relationship initiatives including purchasing, coordination, distribution and record keeping. • Maintain office operations including ordering office supplies, managing equipment and supporting general office organisation. • Maintain document control for office templates, forms and internal documentation. • Support internal projects and initiatives to improve office efficiency and client service delivery. • Assist team members with administrative tasks as required to support the overall operation of the office.

People Specification

Qualification/Licence	<ul style="list-style-type: none"> • High school diploma, Cert III or higher in Business or related discipline or equivalent proven experience. • Drivers Licence.
Experience	<ul style="list-style-type: none"> • 2 + years working experience ideally within Administration • Proficiency in Microsoft Office Suite and other relevant software applications. • Fast and accurate typing skills, experienced in data entry, composing emails and creating documents.
Technical Attributes and Competencies	<ul style="list-style-type: none"> • Highly organised to manage appointments, schedules and documents. • Strong organisational and time-management skills with the ability to prioritise tasks effectively. • Excellent verbal and written communication skills.
Personal Attributes and Competencies	<ul style="list-style-type: none"> • Well presented with a positive “can-do attitude • Strong organisational and time-management skills with the ability to prioritise tasks effectively. • Ability to maintain confidentiality and handle sensitive information with discretion. • Aligned with company values. • Ability to maintain strict confidentiality. • Upholds organisational values.

Commitment

I have fully read and understand the job description and:

- I accept and understand my responsibilities listed in this Job Description and agree to carry them out to the best of my ability.
- I accept and understand the potential implications of breaching my responsibilities listed in this Job Description; and
- I accept and understand that there may be times where I will be given reasonable directions that may not be listed in this Job Description and will carry them out to the best of my ability.

Employee's Signature:		Date:	
Job Description Written By:	HR	Date:	

Form History

Description	Reference#	Date	Authority
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New Position Description

HR-F-201

12/06/2024

CEO

Next Review Due:

July 2025