BENJAMIN ARMSTRONG

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LinkedIn Profile

CURRICULUM VITAE

KEY CREDENTIALS

Direct Experience in:

- ✓ Remediation of Financial Planning Clients
- ✓ GVC – Good Value Calculations for Remediation Clients
- ✓ Construction of Methodology Guides and SOP's – Standard Operating Procedures
- ✓ Client Relationship Management
- ✓ Office Administration
- ✓ Sales Methodologies
- ✓ Meeting/Exceeding Targets
- ✓ OH&S Management
- ✓ Legislative & Policy Compliance
- ✓ Preparation of Complex Documentation
- ✓ Dispute Resolution
- ✓ Market Research & Analysis
- ✓ Team Leadership
- ✓ Coaching, Training & Mentoring
- ✓ Contract Management
- ✓ Business Development/Revenue Generation
- ✓ Stakeholder Engagement
- ✓ 5-Star Customer Service

Undertaken studies in Advance Diploma of Financial Services (RG256), covering topics in:

- ✓ Implement complex and innovative financial plans
- ✓ Conduct complex financial planning research
- ✓ Establish, supervise, and monitor practice systems to conform with legislation and regulations
- ✓ Provide comprehensive monitoring and ongoing service
- ✓ Determine client requirements and expectations
- ✓ Determine client requirements and expectations for clients with complex needs
- ✓ Provide appropriate services, advice and products to clients
- ✓ Develop and nurture relationships with clients, other professionals, and third-party referrers
- ✓ Provide technical and professional guidance
- ✓ Present and negotiate complex and innovative financial plans
- ✓ Develop complex and innovative financial planning strategies

Technology: Microsoft Office suite: Salesforce, Xplan, Worksorted, Coin, Word, Excel, PowerPoint, Outlook; Multi Array; Linux; Symtrix; Onyx; Podium.

EMPLOYMENT HISTORY

People's Choice Business Support Analysis **06/2022–Present**

Working as part of the Business Support team, including multiple key stake holders across the business and subject matter experts. The role involves reviewing operations within Member Fulfillment (Business Support) for efficacies and consistencies across business units.

Works undertaken includes full review of the Bereavement Care Team, Review of Inwards Payment Team, Dormancy Project, Tracker Timing review/maintenance and Work Instructions (WKI) creation/maintenance.

People's Choice Financial Planning Sales & Practice Development Coordinator **11/2021–06/2022**
Financial Planning is about helping you plan for the future. It's more than just retirement planning...it's about creating wealth, and then protecting that wealth.

Supporting the Financial Planning Practice within the operations team. The role involves day to day operations of the Financial Plannning Department with duities including; GVC Calculations and remediation of members files, identifying gaps/problems within Financial Planning process and building out work flows and provide training to CSM's and broader team, regularly communicating with various stakeholders at all levels, coordinating and implementing industry/ASIC changes such as EFDS and OFA's. Support team queues where needed, creation of training and operational guides, data base clean up ready for sale of Financial Planning Practice.
Other duties and roles: Whilst undertaking all the above duties I also am working as part of the transition team supporting the hand over of the Financial Planning business to Fiducian Wealth Management. And continue oversight of Financial Planning Remediation payments until complete.

People's Choice Financial Planning Project Senior Administration Specialist (Financial Planning Remediation Project – ongoing until last payment made by supplier) **05/2019–07/2022**
Financial Planning is about helping you plan for the future. It's more than just retirement planning...it's about creating wealth, and then protecting that wealth.

Working both as part of the Financial Planning Remediation Team and anonymously, supporting Peoples Choice Credit Union to complete over 14,000 file reviews and remediate 'fee for no service' as part of Operation Charlie.

This highly detailed focused role involved; training of remediation team in all facets including inhouse systems and external, stakeholder liaison, construction of training guides, helping flesh out first draft of methodology guide that was used with ASIC, subject matter support for remediation team, report writing as required, liaising with product suppliers, auditing of accounting/sales codes across all providers.

The role involves utilising strong diary/time management, usage of Xplan, Onyx, external product supplier sites, and a various suite of calculators.

People's Choice Credit Union Mobile Home Loan Adviser **02/2018–05/2019**

To help you decide on the best loan for you, we've got a range of home loans to choose from and helpful advice to help you find the right one.

Working both as part of a team and anonymously supporting Peoples Choice Credit Union to meet their new business sales targets whilst maintaining and servicing existing member base. This highly customer focused role involved sales prospecting/lead generation, cross sales of insurance and financial planning products, contract management, KPI setting and tracking, client/stakeholder liaison, sales coaching, and support to NCC teams, management of pipeline and prospective data base management.
The role involves utilising strong diary/time management, usage of Symtix, Onyx, Podium and a various suite of calculators.

Selected Highlights:

- Achieving 228% of application target. Writing $4,800,000 of new business applications vs a budget of $2,100,000

People's Choice Credit Union Financial Planning **02/2017–02/2018**

Financial Planning is about helping you plan for the future. It's more than just retirement planning…it's about creating wealth, and then protecting that wealth.

Financial Planning Support Officer – Reviews Team

Working both as part of a team and anonymously supporting multiple Financial Planners within the review team. The role involves utilising the planner's diary, usage of Xplan, GVC's, 3 week ASIC project role, Fact Find creation, applications and implementation, client remediation, client point of contact and regularly communicating with various stakeholders at all levels.

Selected Highlights:

- Consistently achieving 130% of workflow target.

ANZ Financial Planning **08/2014–02/2017**

Helping create a personalised strategy to help you achieve your goals in the future whilst still enjoying life today.

Financial Planning Support Officer & 6 Month Secondment Practice Support Officer

Working both as part of a team and anonymously supporting multiple Senior Financial Planners, successfully completed the Advanced Diploma of Financial Planning. The role involved planning and utilising the planner's diary, usage of Coin, Fact Find and SRM creation, use of research tools such as ChantWest, SoA editing, applications and implementation, compliance of planner files, client remediation, client point of contact and regularly communicating with various stakeholders at all levels.

Selected Highlights:

- 6 month secondment as Practice Support Officer gaining valuable exposure to all aspects of Financial Planning including other banking departments.
- **Successfully completed Advanced Diploma** whilst working in this position in a full-time capacity.

Martin Brower **01/2012–08/2014**

World leader in the provision of end-to-end supply chain management solutions to quick service restaurants.

Warehouse Operative

Undertook this position whilst planning for a future in financial services, including studying for a Diploma of Financial Planning / Financial Services. The role involved stock inventory and control, ordering and procurement, fulfilment of orders, operating a 1.4t forklift truck and reach truck, and regularly communicating with delivery drivers and various stakeholders at all levels.

Selected Highlights:

- Contributed to Martin Brower SA winning **2nd Place Australian Distribution Centre of the Year, 2013**. Mitigated damage and loss, achieved pick and run targets and loading/unloading of transportation targets.
- **Successfully completed Diploma** whilst working in this position in a full-time capacity.

Brock Harcourts **08/2007–12/2011**

Offers a full range of real estate service including residential, commercial and industrial, property management, financial services, and conveyancing.

Sales Associate & Personal Assistant

After successfully attaining a Certificate IV in Property (Real Estate), utilised sales and relationship management skills to achieve outstanding results in residential property sales. This highly customer focused role involved property appraisals, sales prospecting/lead generation, open inspections, contract management, KPI setting and tracking, client/stakeholder liaison, management of property listings and office website, social media management, and coaching/mentoring new sales consultants.

Selected Highlights:

- **Received several achievement awards** for maintaining a place in the Top 6 Personal Assistants for Harcourts South Australia, including No. 1 Personal Assistant in SA for the 01-03/2011 quarter.
- **Increased vendor satisfaction** by arranging 2-3 viewings per week, including a midweek after hours inspection, rather than the previous 1-2 per week, therefore alleviating the need for one-off private viewings. This also created a sense of strong competition between potential buyers, as well as enhancing workflow management, allowing more time for prospecting and appraisals, and ensuring a consistent stream of sale properties in the portfolio.
- Partnered with sales manager and contributed to **35% increase** in after tax commission for the 01-03/2011 quarter. By the end of 2011 a sustained level of higher sales was being achieved**.** Achieved this by establishing an Effective Business Unit (EBU) and pioneering a new (to that time) approach with regards to streamlining the sales process for both the vendor and purchaser.
- In collaboration with sales partner, **consistently met or exceeded all set KPIs for 2011**. These included 5 appraisals per week, 2-3 listing per week, and 2-3 sales per week.

Freedom **12/2005–08/2007**
Australian furniture and homewares specialists.
Homewares Manager

Managed up to 8 employees in the Homewares department which involved comprehensive training of new staff, coaching and mentoring existing staff, managing set targets and KPIs, receipt reconciliation and general cash handling, assisting customers with all manner of enquiries, health and safety management as the nominated store OH&S Representative. Recognised for leading by example and successfully managing and motivating the team to achieve/exceed their incentive awards for individuals and the store.

Selected Highlights:

- **Introduced and coordinated Freedom's first group interview** which resulted in a high quality, driven sales team. Staff members had a positive outlook and the confidence to perform in public environments such as before a group of customers.
- **Recognised in 2006 performance review** for *"training staff in attaining higher levels of performance and achievement, and for encouraging employees and teams to excel*".
- **Achieved 116% of year-to-date budget 02/2007 compared with previous 80-83%**, successfully establishing the first profitable Freedom Homewares department in South Australia. Achieved this by implementing various merchandising initiatives, effective management of stock, ensuring a strong customer focus team-wide, and proactively rearranging job allocations as necessary.
- **Won a Recognition Certificate** for consistently striving to achieve and exceed budget 02/2007.

Sanity **11/2003–12/2005**
Store Manager & State Trainer

Led a team of up to 18 employees and coached new and existing staff statewide in sales techniques and methodologies. Won the Crest Aria Award 2004 in recognition for achieving the highest percentage of growth over budget.

QUALIFICATIONS

- Advanced Diploma of Financial Planning
- Diploma of Financial Planning / Financial Services RG146, 2013
- Certificate IV Property (Real Estate), 2008
- Administration – First Impressions course, 2007.
- Certificate III Retail Operations, 2003
- Advanced Shift Management Course, 2003
- Basic Shift Management Course, 2002

REFERENCES

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Practice Manager
People's Choice Financial Planning
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