IAS Insurance Advisory Service

ACCOUNTABILITY CHART

MANAGING DIRECTOR VISIONARY
JO

Vision & Direction
Leadership & Culture
Rainmaker & Key Relationships
Business Growth & Acquisitions
Innovation & Strategic Opportunities
Final Business Decisions

STRATEGIC BUSINESS INTEGRATOR
KERRY

Strategic planning and prioritisation
Leadership Meeting and accountability rhythm
Business analysis and commercial insight
Strategic project and change management
Leadership development and organisational clarity
Managing Director support

RESPONSIBLE MANAGERS – JOANNE BRASSETT & TERESA ANDERSON

MARKETING DEPARTMENT

MARKETING MANAGER
JACQUI
(CREATIVE BUNDY)

Social Media
Branding
Lead Marketing
Special Projects

COPYWRITER
DEBBIE
(CONTRACTOR)

Blogs
E-Books
Content
Special Projects
Social Media

MARKETING ADMIN
DIMPLE
(IASG)

Lead Magnets
Tracking
Marketing/Sales
Co-ordinator
Social Media
Co-ordinator
Diary Mgt

GENERAL INSURANCE DEPARTMENT

ACCOUNT DIRECTOR
TERESA

General Insurance Compliance
Large & Key Accounts
Claims
Policy Reviews
Reporting & Debtors
General Budget & Reconciliation
New Business
Complaints Officer – General

SNR ACCOUNT EXECUTIVE
LISA

Oversee SELE General Team
GroupCare Meetings
Quotes & SOA Requests
Compliance Reviewing
Clients
SMR Accounts & New
Clients Accounts
Claims & Accounts
Reviewing Insurers, Debtors
Staff Training & Mentoring

JUNIOR ACCOUNT EXECUTIVE
FHEVY (GEN)
(IASG)

General Insurance
Compliance Reviewing
Clients
SMR Accounts
Claims & Accounts
New Business
Reviewing Insurers
Debtors
Staff Training & Mentoring

BROKER ASSISTANT
CHARLIZE (GEN)
(IASG)

Admin Queries
Review Paperwork
Filing
General Insurance
Compliance Database
Updates & Reporting
Debtors & CC's
Claims
Procedures.

ADMIN ASSISTANT
LOU (GEN)
(IASG)

Admin Queries
Review Paperwork
Filing
General Insurance
Compliance Database
Updates & Reporting
Debtors & CC's
Claims
Procedures.

FINANCIAL PLANNING DEPARTMENT

SNR FINANCIAL ADVISOR
JO

Life/FP Compliance
New Business
Renewals & Strategy
Life/FP Budgets
Quotes & Comparisons
Client Meetings/Reviews
SOA Reviews
Reporting

PARAPLANNERS
CLIQUE PARAPLANNING/ PLANIMATE)

SOA's
Strategy
Calculations
Projections
Video SOA's

FINANCIAL PLANNING ASSOCIATE
CARMEN

Oversee SELE Life/FP Team
Life/FP Compliance
NB Quotes & SOA Requests
Strategy & Comparisons
FOFA & FCIS Management
Client Meetings & Reviews
Client Applications &
Suspense
Staff Training & Mentoring

SENIOR CLIENT SERVICES ADMIN
JEFF (LIFE/FP)
(IASG)

Life/FP Client Admin Queries
Reviews / Filing
Life/FP Compliance
Database Updates
Client Reporting, Debtors &
CCC's
FOFA Admin & Claims
Processes & Procedures
Alteration Quotes

SENIOR CLIENT SERVICES ADMIN
ALYZA (LIFE/FP)
(IASG)

Life/FP Client Admin Queries
Reviews / Filing
Life/FP Compliance
Database Updates
Client Reporting, Debtors &
CCC's
FOFA Admin & Claims
Processes & Procedures
Alteration Quotes

CLIENT SERVICES ADMIN
EMILIA (LIFE/FP)

Life/FP Client Admin Queries
Reviews / Filing
Life/FP Compliance
Database Updates
Client Reporting, Debtors &
CCC's
FOFA Admin & Claims
Processes & Procedures
Alteration Quotes

ADMIN ASSISTANT
LESLIE (LIFE/FP)
(IASG)

Reviews / Filing
Life/FP Compliance
Database Updates
Client Reporting, Debtors &
CCC's
FOFA Admin & Claims
Processes & Procedures

OPERATIONS & PEOPLE DEPARTMENT

OPERATIONS AND PEOPLE MANAGER
LEAH

People and HR operations
Operational leadership and team coordination
Finance administration and reporting
Compliance and governance coordination
Systems, office and process management
Support for strategic implementation

CFO
JENNY
(JTR & ASSOCIATES)

Reporting & Budget
Financial Viability
ATO BAS & Tax Reporting
ASIC Company Reviews

COMPLIANCE
STEADFAST

MY DEALER SERVICES

IT & PHONES
JUSTIN / DEB
(POWERBITS/ REALWORLD)

Software and Hardware
Support (Powerbits)
Phone Support (Real world)

OPERATIONS SUPPORT
DIMPLE
(IASG)

Lodgement Statements
Authorisations
Office Invoice Filing
Xero Uploads
Reconciliation
Finance Reporting