(IAS)
ACCOUNTABILITY CHART

VISIONARY
JO

Lead Manage Accountable
20 Ideas & Creative Problem Solving
Big Relationships
Culture
R&D

BUSINESS COACH
CATH
(Saruba)

Facilitator

MARKETING
JO **(RM)**

Lead Manage Accountable
Strategy
Branding
PR
Social Media
Blogs

GROWTH & RETENTION - GEN
TERESA **(RM)**

Lead Manage Accountable
Revenue & Budgets
New Business/New Clients
Referral Opportunities
Account Management
Retention & Satisfaction

GROWTH & RETENTION - FP
JO **(RM)**

Lead Manage Accountable
Revenue & Budgets
New Business/New Clients
Referral Opportunities
Account Management
Retention & Satisfaction

INTEGRATOR - OPERATIONS
LEAH

Lead Manage Accountable
Remove Obstacles & Barriers
Practice Management
Profit and Loss & Reporting
Cashflow & Payroll
HR

DIGITAL MARKETING

Projects
Social Media
Facebook Advertising
Lead Magnets

MARKETING MGR
JACQUI
(Creative Bundy)

Branding
Images
Strategy
Projects
Website Design

COPYWRITER
DEBBIE
(Contractor)

Blogs
E-Books
Content
Special Projects

ACCOUNT MANAGER
TERESA

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

SNR FINANCIAL ADVISOR
JO

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

PRACTICE MGR
LEAH

HR & Contracts
Accounts Payable & Receivable
Banking & Invoicing / Payroll
Compliance & AFSL Management
Office Administration
Outsource Manager
Life/FP Sales Reporting
Complaints Officer – Life/FP

CFO
JENNY
(JTR & Associates)

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

COMPLIANCE
BRETT & CATHY
(Smart Comp & Cathy Chambers)

ASIC Queries
Audits
Compliance Queries

IT & PHONES
HAYDEN
(Powerbits/R.World/ IT Logic)

Software and Hardware
Support (Powerbits)
Internet (IT Logic)
Phone Support
(RealWorld)

OPERATIONS SUPPORT
ALYZA (OPERATIONS)
(5ELK)

Oversee 5Elk Reception.
Life/FP Commission
Accounts Inbox
Office Invoice Filing
Ad Hoc Compliance Tasks
5Elk Training Updates
IT Administrative Support
General Office Support

SNR ACCOUNT EXECUTIVE
LISA

Oversee 5ELK General Team!
One2One Meetings
General Insurance Compliance
Reviewing Clients
SME Accounts & New Business
Claims & Accounts
Reviewing Invoices, Debtors
Staff Training & Mentoring

CLIENT SERVICES MANAGER
CARMEN

Oversee 5Elk Life/FP Team
Life/FP Compliance
NB Quotes & SOA Requests
Strategy & Comparisons
FOFA & FDS Management
Client & BDM Meetings
Client Applications & Suspense
Staff Training & Mentoring

ASSOCIATE ADVISOR
REBECCA

Oversee 5Elk Life/FP Team
Life/FP Compliance
NB Quotes & SOA Requests
Strategy & Comparisons
FOFA & FDS Management
Client & BDM Meetings
Client Applications & Suspense
Staff Training & Mentoring

5ELK TEAM
FHEVY, SUNNY, RONA, JEFF, TARA

Reception

SNR INSURANCE ASSOCIATE
FHEVY (GEN)
(5ELK)

Team Training & Mentoring
Admin Processing – Binding
Processing Invoices
Insurer Closings
Notion Updates
Team Meeting Agendas
Admin Queries / Tasks
Review Paperwork / Filing
General Insurance Compliance
Database Updates
Debtors & COC's
Feedsy Updates

ACCOUNT EXECUTIVE
RENEE

General Insurance Compliance
Reviewing Clients
SME Accounts
Claims & Accounts
New Business
Reviewing Invoices
Debtors
Staff Training & Mentoring

SNR CLIENT SERVICES ADMIN
SUNNY (LIFE/FP)
(5ELK)

Team Training and Mentoring
Life/FP Client Admin Queries
Review Paperwork
Filing
Life/FP Compliance
Database Updates
Client Reporting
Debtors & COC's
FOFA Admin & Claims
Processes & Procedures
Alteration Quotes

PARAPLANNERS
ARAN
(Clique Paraplanning)

SOA's
Strategy Calculations
Projections

GI CLIENT ADMIN
RONA (GEN)
(5ELK)

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

GI CLIENT ADMIN
TARA (GEN)
(5ELK)

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

CLIENT SERVICES ADMIN
JEFF (LIFE/FP)
(5ELK)

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

CLIENT SERVICES ADMIN
ALYZA (LIFE/FP)
(5ELK)

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