(IAS)
ACCOUNTABILITY CHART

VISIONARY
JO
Lead Manage Accountable
20 Ideas & Creative Problem Solving
Rainmaker
Business Acquisitions
Big Relationships
Culture
R&D

BUSINESS COACH
CATH
(Saruba)
Facilitator

RESPONSIBLE MANAGERS – JOANNE BRASSETT & TERESA ANDERSON

MARKETING
JO
Lead Manage Accountable
Strategy
Branding
PR
Social Media
Blogs

MARKETING MANAGER
JO
Social Media
Branding
Lead Marketing
Special Projects

DIGITAL MARKETING
GARY
(Valore Media)
Facebook Advertising
Lead Magnets

MARKETING
JACQUI
(Creative Bundy)
Branding
Images
Strategy
Projects
Website Design
Social Media

COPYWRITER
DEBBIE
(Contractor)
Blogs
E-Books
Content
Special Projects
Social Media

MARKETING/EA SUPPORT (3 DAYS)
DIMPLE
(6ELK)
Lead Magnets Tracking
Marketing/Sales
Co-ordinator
Social Media Co-ordinator
Diary Management

GROWTH & RETENTION - GEN
TERESA
Lead Manage Accountable
Revenue & Budgets
New Business/New Clients
Referral Opportunities
Account Management
Retention & Satisfaction

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

SNR INSURANCE ASSOCIATE
FHEVY (GEN)
(6ELK)
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

GI CLIENT ADMIN
RONA (GEN)
(6ELK)
Admin Queries
Review Paperwork
Filing
General Insurance Compliance
Database Updates & Reporting
Debtors & COC's
Claims
Procedures

GI CLIENT ADMIN
VACANT (GEN)
(6ELK)
Admin Queries
Review Paperwork
Filing
General Insurance Compliance
Database Updates & Reporting
Debtors & COC's
Claims
Procedures

GROWTH & RETENTION - FP
JO
Lead Manage Accountable
Revenue & Budgets
New Business/New Clients
Referral Opportunities
Account Management
Retention & Satisfaction

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

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

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

CLIENTS SERVICES OFFICER (GRADUATE) – PART-TIME
BEN
Life/FP Compliance
NB Quotes & SOA Requests
Strategy & Comparisons
FOFA & FDS Administration
Client & BDM Meetings
Client Applications & Suspense

PARAPLANNERS
JACKIE
(Clique Paraplanning)
SOA's
Strategy Calculations
Projections

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

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

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 (Real-world)

OPERATIONS SUPPORT
ALYZA (OPS)
(5ELK)
Oversee 5Elk Reception.
Office Invoice Filing
Ad Hoc Compliance Tasks
5Elk Training Updates
IT Administrative Support
General Office Support

5ELK TEAM
FHEVY, SUNNY, RONA, JEFF
Reception

OPERATIONS SUPPORT - FINANCE ADMIN (2 DAYS)
DIMPLE
(6ELK)
Life/FP Commission
Accounts Inbox
Office Invoice Filing
Xero Uploads
Reconciliation
Finance Reporting