VA PLATINUM
The Outsourcing Experts

87 Tasks You Can Outsource to Financial Planning Virtual Assistant

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List Content

GENERAL ADMIN

EMAIL MANAGEMENT	DOING NOW	WANT TO DO	N/A
Organise and categorise emails according to priority and urgency.	☐	☐	☐
Draft responses in a professional yet friendly tone suitable for Australian communication styles.	☐	☐	☐
Unsubscribe from irrelevant subscriptions and manage newsletters.	☐	☐	☐
CALENDAR MANAGEMENT	**DOING NOW**	**WANT TO DO**	**N/A**
Schedule appointments and meetings, considering Australian time zones (AEST, ACST, AWST).	☐	☐	☐
Send out calendar invites using Australian public holidays and business hours.	☐	☐	☐
Coordinate schedules for team members, especially during daylight saving changes.	☐	☐	☐
DATA ENTRY	**DOING NOW**	**WANT TO DO**	**N/A**
Input and update data into Australian-specific software or databases (e.g., MYOB, Xero).	☐	☐	☐
Ensure compliance with Australian data privacy laws when handling sensitive information.	☐	☐	☐
Maintain and organise digital filing systems, ensuring access for relevant parties.	☐	☐	☐
DOCUMENT PREPARATION	**DOING NOW**	**WANT TO DO**	**N/A**
Create and format documents according to Australian standards (e.g., APA referencing).	☐	☐	☐
Proofread documents for clarity, grammar, and adherence to Australian English conventions.	☐	☐	☐
Convert documents to the required formats (e.g., PDF for formal submissions).	☐	☐	☐

GENERAL ADMIN

RESEARCH	DOING NOW	WANT TO DO	N/A
Conduct research on Australian markets, competitors, and industry trends.	☐	☐	☐
Gather information on government regulations that may affect the business (e.g., Fair Work, Australian Taxation Office).	☐	☐	☐
Compile reports or presentations that reflect Australian cultural and legal contexts.	☐	☐	☐
SOCIAL MEDIA MANAGEMENT	**DOING NOW**	**WANT TO DO**	**N/A**
Schedule and post content on Australian platforms and times for maximum engagement.	☐	☐	☐
Monitor comments and messages, responding in a friendly and culturally aware manner.	☐	☐	☐
Assist in creating a content calendar that aligns with Australian holidays and events.	☐	☐	☐
CLIENT COMMUNICATION	**DOING NOW**	**WANT TO DO**	**N/A**
Manage communication with Australian clients and stakeholders, adhering to local etiquette.	☐	☐	☐
Prepare and send out newsletters, updates, or promotional materials that resonate with the Australian audience.	☐	☐	☐
Handle enquiries and provide support with an understanding of local services and products.	☐	☐	☐
PROJECT MANAGEMENT	**DOING NOW**	**WANT TO DO**	**N/A**
Assist in planning and organising projects using Australian project management software (e.g., Wrike, Monday.com).	☐	☐	☐
Track project timelines and deadlines, considering public holidays and seasonal availability.	☐	☐	☐
Facilitate team collaboration, especially in remote or distributed teams across Australia.	☐	☐	☐

GENERAL ADMIN

FINANCIAL MANAGEMENT	DOING NOW	WANT TO DO	N/A
Manage invoicing and billing processes using Australian accounting software.	☐	☐	☐
Track expenses, ensuring compliance with GST regulations and tax requirements.	☐	☐	☐
Prepare financial reports or summaries for stakeholders, adhering to Australian financial practices.	☐	☐	☐
TRAVEL ARRANGEMENTS	**DOING NOW**	**WANT TO DO**	**N/A**
Research and book flights, accommodations, and transportation within Australia.	☐	☐	☐
Prepare itineraries that include local travel tips and recommendations.	☐	☐	☐
Ensure compliance with any travel restrictions or regulations relevant to Australian travel.	☐	☐	☐
CUSTOMER SUPPORT	**DOING NOW**	**WANT TO DO**	**N/A**
Provide customer support via phone, email, or chat, using Australian service standards.	☐	☐	☐
Handle enquiries, complaints, and feedback with a focus on resolution and customer satisfaction.	☐	☐	☐
Maintain a record of customer interactions and follow-up actions.	☐	☐	☐
EVENT PLANNING	**DOING NOW**	**WANT TO DO**	**N/A**
Assist in planning and organising virtual or in-person events (e.g., conferences, webinars) tailored to Australian audiences.	☐	☐	☐
Coordinate logistics such as venue selection, catering, and technology setup.	☐	☐	☐
Manage RSVPs and communication with attendees.	☐	☐	☐

PARAPLANNING

CLIENT DATA MANAGEMENT	DOING NOW	WANT TO DO	N/A
Collecting and organising client information.	☐	☐	☐
Maintaining up-to-date client records in CRM systems.	☐	☐	☐
RESEARCH AND ANALYSIS	**DOING NOW**	**WANT TO DO**	**N/A**
Conducting research on investment products, superannuation funds, and insurance policies.	☐	☐	☐
Analysing client portfolios and providing insights.	☐	☐	☐
PREPARATION OF FINANCIAL DOCUMENTS	**DOING NOW**	**WANT TO DO**	**N/A**
Drafting Statements of Advice (SoAs) and other financial documents.	☐	☐	☐
Creating and formatting presentation materials for client meetings.	☐	☐	☐
COMPLIANCE AND REGULATORY CHECKST	**DOING NOW**	**WANT TO DO**	**N/A**
Ensuring all documentation complies with relevant regulations and standards.	☐	☐	☐
Assisting with the preparation of compliance reports.	☐	☐	☐
CLIENT COMMUNICATION	**DOING NOW**	**WANT TO DO**	**N/A**
Drafting emails and correspondence to clients.	☐	☐	☐
Scheduling client meetings and follow-ups.	☐	☐	☐

PARAPLANNING

BUDGETING AND FORECASTING	DOING NOW	WANT TO DO	N/A
Assisting with cash flow analysis and budgeting tasks.	☐	☐	☐
Preparing financial projections based on client information.	☐	☐	☐
REPORT GENERATION	**DOING NOW**	**WANT TO DO**	**N/A**
Compiling and generating financial reports for clients and advisors.	☐	☐	☐
Creating performance review summaries for investment portfolios.	☐	☐	☐
SOFTWARE MANAGEMENT	**DOING NOW**	**WANT TO DO**	**N/A**
Using financial planning software (e.g., Xplan, AdviserLogic) to input and analyse data.	☐	☐	☐
Keeping up with updates and changes in financial planning software tools.	☐	☐	☐
MARKET TRENDS MONITORING	**DOING NOW**	**WANT TO DO**	**N/A**
Keeping track of financial market trends and news that may impact client portfolios.	☐	☐	☐
Reporting relevant findings to financial advisors.	☐	☐	☐
TRAINING AND SUPPORT	**DOING NOW**	**WANT TO DO**	**N/A**
Providing administrative support for training sessions related to financial products and services.	☐	☐	☐
Assisting with onboarding new clients by providing them with necessary information and resources.	☐	☐	☐

PARAPLANNING

TASK MANAGEMENT	DOING NOW	WANT TO DO	N/A
Organising and prioritising tasks for financial planners.	☐	☐	☐
Tracking deadlines and follow-ups on action items.	☐	☐	☐
DOCUMENTATION AND FILING	**DOING NOW**	**WANT TO DO**	**N/A**
Managing and organising digital files and documents.	☐	☐	☐
Ensuring that all client documentation is properly filed for easy access.	☐	☐	☐

FINANCIAL PLANNING ADMIN			
ADMINISTRATIVE SUPPORT	**DOING NOW**	**WANT TO DO**	**N/A**
Managing calendars and scheduling appointments for financial planners.	☐	☐	☐
Handling incoming calls and emails, responding to inquiries, and directing them appropriately.	☐	☐	☐
Maintaining and organising digital files and documents.	☐	☐	☐
CLIENT MANAGEMENT	**DOING NOW**	**WANT TO DO**	**N/A**
Assisting with onboarding new clients, including collecting and organising necessary documentation.	☐	☐	☐
Updating client information in CRM systems and ensuring data accuracy.	☐	☐	☐
Sending out client welcome packages or informational materials.	☐	☐	☐
MARKETING ASSISTANCE	**DOING NOW**	**WANT TO DO**	**N/A**
Creating and managing social media content and posts to enhance online presence.	☐	☐	☐
Assisting with email marketing campaigns, including drafting and sending newsletters.	☐	☐	☐
Coordinating events, webinars, or workshops for client engagement and education.	☐	☐	☐
RESEARCH SUPPORT	**DOING NOW**	**WANT TO DO**	**N/A**
Conducting market research on financial products, services, or industry trends.	☐	☐	☐
Gathering information for financial planners to use in client presentations or recommendations.	☐	☐	☐

FINANCIAL PLANNING ADMIN			
DOCUMENT PREPARATION	**DOING NOW**	**WANT TO DO**	**N/A**
Drafting and formatting client reports, presentations, and other documents.	☐	☐	☐
Preparing meeting agendas and minutes for team meetings or client meetings.	☐	☐	☐
CLIENT COMMUNICATION	**DOING NOW**	**WANT TO DO**	**N/A**
Drafting and sending follow-up emails to clients after meetings.	☐	☐	☐
Coordinating reminders for upcoming appointments or deadlines.	☐	☐	☐
TASK AND PROJECT MANAGEMENT	**DOING NOW**	**WANT TO DO**	**N/A**
Using project management tools to track tasks and deadlines for financial planners.	☐	☐	☐
Assisting in the prioritisation and organisation of tasks and projects.	☐	☐	☐
BOOKKEEPING AND FINANCIAL RECORD KEEPING	**DOING NOW**	**WANT TO DO**	**N/A**
Assisting with basic bookkeeping tasks, such as invoicing clients and tracking expenses.	☐	☐	☐
Managing receipts and documentation for financial records.	☐	☐	☐
TRAINING AND DEVELOPMENT SUPPORT	**DOING NOW**	**WANT TO DO**	**N/A**
Scheduling training sessions or professional development opportunities for the financial planning team.	☐	☐	☐
Compiling resources and materials for ongoing education.	☐	☐	☐

FINANCIAL PLANNING ADMIN			
TECHNOLOGY SUPPORT	**DOING NOW**	**WANT TO DO**	**N/A**
Assisting with the management of software tools and platforms used in financial planning.	☐	☐	☐
Troubleshooting basic technical issues or coordinating IT support as needed.	☐	☐	☐
COMPLIANCE AND REGULATORY ASSISTANCE	**DOING NOW**	**WANT TO DO**	**N/A**
Helping to ensure that all communications and documentation meet compliance requirements.	☐	☐	☐
Assisting in preparing documentation for audits or compliance checks.	☐	☐	☐
CLIENT FEEDBACK AND SURVEYS	**DOING NOW**	**WANT TO DO**	**N/A**
Designing and distributing client feedback surveys to gather insights and improve services.	☐	☐	☐
Analysing feedback and preparing summaries for financial planners.	☐	☐	☐