

SIPOC RESOURCES SDN. BHD.

(Company No. 985302-A)



Company Overview

SIPOC Resources Sdn Bhd is a business platform for financial intermediaries in Malaysia. The Company focuses on increasing the productivity of financial intermediaries by ensuring efficiency and effectiveness in fulfilling their customer needs.

PLANNING & SOLUTION EXECUTIVE

Remuneration (Internship, Salary, Commission) is subject to qualification & experience

No. of Vacancies available: 4

Location: Kuala Lumpur, Penang, Ipoh, Kota Kinabalu and Miri

Responsibilities

We are looking for candidates who are undertaking their CFP Certification studies, with the intention of practicing what they have learnt, and whom would like to add value to Malaysians through proper financial planning. Candidates must be able to travel, and be willing to be relocated to others branches if required.

- Reports to HOD, Planning & Solutions and coordinate with Relationship Managers and Operations Department to maintain clients' files; conduct planning and propose solutions for clients' cases.
- Provide solutions & generate reports
- Gather information from clients
- Prepare weekly productivity reports for weekly department meetings

Requirements

1. Candidates who have completed at least 4 out of the 6 CFP Certification Modules,
2. Estate Planning certification, or
3. Under going financial planning certification (RFP / Syariah RFP / CFP / IFP)

How to Apply

Interested applicants are invited to apply online with your detailed resume stating working experience, current and expected salary, and a recent photograph. Only short listed candidates will be notified.

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No. 1-2, Jalan 2/76C, Desa Pandan, 55100 Kuala Lumpur.

Tel No.: 603-9202 5666 Fax No.: 603-9201 5666

Email: jeanniecheong@sipoc.my