Join A World-Class Team Of Independent Financial Advisors

Started in 2000, Whitman is today one of the largest independent financial advisory company's in the country, advising more than RM1.4 billion worth of client's wealth (as of 31 Dec 2014). Our approach is to always put the client at the heart of everything we do.

We are proud to boast one of the most talented and highly qualified independent financial advisory teams in Malaysia.

We are looking for individuals with the interest to offer high quality comprehensive and holistic financial advice to middle class and high net worth clients.

Independent Financial Advisor

The Role

Using Whitman's proprietary money optimisation advisory system to help clients optimise their money, achieve financial freedom and become wealthy

Our Support

Whitman aspires to be a financial planning firm that provides the most comprehensive system and support to any financial planners/advisors starting in the financial planning industry.

The following are some of the systems, tools and support in place at Whitman:

1. **Leads generation (Marketing)**

- Attractive value proposition
- Strong professional branding
- Marketing activities to generate leads (E.g. education seminars)
- Supply of qualified leads

2. **Leads Conversion (Selling)**

- Standard slides to introduce company and services
- Service pricing & menu
- Sample client documents to show prospective client
- Joint sales meeting with senior IFAs

3. **Service delivery & Back-end Support**

- Financial plan preparation & presentation
- Asset allocation statement preparation & presentation
- Meeting agenda
- Education slides for clients
- Regular client advisory coaching
- Subject matter specialist (E.g. insurance specialist)
- Joint meeting with senior IFAs

4. **Product execution**

- Access to multiple financial products from multiple companies
- Annual action plan and time table
- Unit Trust proposal presentation system
- Life insurance proposal presentation system
- Meeting agenda
- Business submission and processing system

5. **Client Servicing**

- Consolidated investment performance reporting
- Savings optimisation form
- Unit trust portfolio restructuring system
- Unit trust portfolio rebalancing system
- Unit trust portfolio profit taking system
- EPF deduction system for unit trust investment
- Newsletter
- Consolidated annual report card

Our Requirements

We are looking for people who:

- Believe in taking care of the client's best interest
- Enjoy meeting and sharing knowledge with people
- Are disciplined and able to follow proven business systems
- Are a team player
- Confident and professional
- Has the drive and ambition to succeed

It is not essential for you to have an existing client base of our target market to join Whitman. We will support you by providing qualified leads to help you get started. We will also equip you with the necessary skills and system to help you successfully generate your own leads.

For further information about career opportunities with Whitman, our contact details are as follows:

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