Wealth Vantage Advisory Sdn Bhd

WEALTH VANTAGE

Wealth Vantage Advisory Sdn. Bhd. was formed to be the firm of choice by clients and financial advisors, leading the change in the industry by focusing on the right way of doing things.

We assist client to achieve their financial goals by providing holistic end-to-end financial services.

Our full-fledged operation support services is enhanced by the use of technology and process driven implementation. Our mission is to develop and nurture the right value system for our advisors and employees, and demonstrate that value system with our clients.

Executive, Planning & Solutions

Full Time Employee

Initial Monthly Salary: RM2,500

Location: Desa Pandan, Kuala Lumpur

Reports to Head of Unit, Planning & Solutions and coordinate with Relationship Managers and Sales Administration team to maintain clients' files, do planning and proposed solutions for client's cases.

Responsibilities

No	Key Areas	Tasks
1	Product Knowledge	o Refer to relevant product manuals and materials (eg Product Disclose Sheet (PDS), Rate Book, Asset Allocation, Products Manual) o Attend product training when necessary and available
2	Client Folder	o Create client folder when necessary and attach to servicing RM/PU o Ensure all necessary files are in the folder o Transfer client data from worksheet to client folder
3	Planning & Solutions	o Prepare solution and generate report o Gather information o Liaise with client in gathering information via phone call, email, SMS. o Must be familiar with all the planning & solutions tools (refer appendix) o Familiar with working process with respective product providers
4	Open cases	o To receive documents from CS o To work on the recommended solutions for clients o Incomplete documents to liaise with RMs

		○ Go through client solutions with respective RM before appointment
5	Close cases	○ Update weekly open cases report so that operations can submit application ○ Insurance cases ensure policy received then prepare summary and put in client folder & inform OC to make appointment for RM to deliver policy

Requirements

- Academic Qualification: Bachelor's Degree in Finance or Financial Planning
- Financial Planning related qualifications: Certified Financial Planner (CFP), Islamic Financial Planner (IFP), Registered Financial Planner (RFP), Shariah Registered Financial Planner (Shariah RFP)
- Career level: Entry level
- Years of Experience: Minimum 1 year / fresh graduate with internship experience
- Able to work with people at all levels, possess analytical skill, telephone skill and presentation skill.

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 shortlisted candidates will be notified.

Wealth Vantage Advisory Sdn Bhd

1-2, Jalan 2/76C, Desa Pandan, 55100, Kuala Lumpur

Email to: hr@wealthvantage.com.my

Our career webpage link: https://www.wealthvantage.com.my/careers