

Wealth Vantage Advisory Sdn Bhd



WEALTH VANTAGE

Wealth Vantage is on the search for world-class salaried advisor talents!

If you want to take your financial services career to the next level, we have the tools and resources you need to succeed. With our world-class coaching and support team, you will have access to the guidance and mentorship you need to thrive in today's fast-paced financial world. 🚀

We are here to journey with you to achieve your goals, and we're looking for driven individuals who are ready to take on the challenge to help Malaysians achieve financial freedom! ✨

As a Wealth Vantage salaried advisor, you will enjoy a wide range of benefits, including world-class support, a performance-driven team culture, holistic financial planning and leverage on the latest technology. And with our focus on work-life balance, you will have the flexibility to achieve both your personal and professional goals.

If you are ready to take the next step in your career, we need you!

Salaried Advisor

Full Time Employee (Immediate)

Initial Monthly Salary: RM2,500

Location: Desa Pandan, Kuala Lumpur

Reports to a Senior Advisor (Licensed Financial Planner) and perform tasks assigned by Senior Advisor and WVA Management

Responsibilities

No	Key Areas	Tasks
1	Financial Advisory service: <ul style="list-style-type: none">- Client Management- Case Management- Activity Management	<ul style="list-style-type: none">o Attend all meetings with Clients/Leads together with Senior Advisor.o Assists Senior Advisor in all administrative related tasks : e.g. instruction order, client database update and liaising with back office (Planning & Solutions / Sales Admin) for outstanding itemso Assist in Financial Planning related tasks e.g. fact finding, handover, meeting minuteso Salaried Advisors will have option to practice independently after completing 1 year of service

Requirements

- Financial Planning related qualifications: Certified Financial Planner (CFP), Islamic Financial Planner (IFP), Registered Financial Planner (RFP), Shariah Registered Financial Planner (Shariah RFP)

- Academic Qualification: Bachelor's Degree or equivalent which is accepted for Financial Planning professional qualification
- Career level: Entry level
- Years of Experience: 2 years and below
- Skills / Competency:
 - Good competency in English skills
 - Knowledge of Microsoft Office, Google Workspace (e.g. Gmail, Google Drive, Google Sheets)
 - Competency in follow-ups and follow through on cases / progress / activity updates
 - Ability to adapt and grow in a competitive environment

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.

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