Wealth Vantage Advisory Sdn Bhd

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.

Financial Advisor

Licensed Financial Advisor / Planner (Junior, Advisor & Senior)

Remuneration: Commission Based

No. of Vacancies available: 40 Vacancies

Location: Desa Pandan, Kuala Lumpur

Responsibilities

Carry out financial advisory activities from acquiring new clients, service introduction, present comprehensive financial plan, or modular plan, i.e., wealth accumulation, wealth protection and wealth transfer, monitor financial plan implementation and maintain a good relationship with client throughout engagement for more business opportunities and growth generation while maintaining and complying to standard practice requirements sets by regulators and Wealth Vantage Advisory Sdn Bhd.

No	Key Areas	Tasks
1	License maintenance	Responsible for ensuring the fulfillment of every license requirement as per stated by the regulator/issuer.
2	Goal Setting and Performance Alignment	Projecting and reviewing overall and product/service based gross and nett income targets and critical success factors on yearly basis.
3	Prospecting and Branding	Attending to potential clients provided by the firm in a timely and fully prepared manner as per guidance sets by the Sales Department, if provided with potential client from the firm.
4	Sales Activities	Fulfilling compulsory sales meetings from the Discovery sessions and Introduction of Services to potential clients followed by the Fact Finding, Present Solutions, Implementation to the Review meeting and ensuring all meeting's objectives are met.
5	Legal Compliance	Maintaining updated knowledge of regulations and standard practices.

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.
- Years of Experience: 2 years and above

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.

Wealth Vantage Advisory Sdn Bhd

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