Client Advisor

Job Description

The Group Consumer Financial Services division serves almost 3 million customers across Singapore, Malaysia, Indonesia and China. In Malaysia, our customer proposition caters to high net worth, premier and emerging affluent individuals through our premier private, wealth management and affluent banking propositions.

In CFS, we offer an accelerated career path for aspiring graduates to be future leaders. It is a start to a rewarding career opportunity that provides you a comprehensive and hands-on assignment, as well as exposure to the real-world challenges in Consumer Banking & Wealth Management. We provide the platform for you to demonstrate and showcase your critical thinking ability and innovative ideas, whilst sharpening your personal and professional competencies.

Financial

- To provide quality wealth advisory services and financial product recommendations to HNW Private Clients.
- To enhance franchise value by cross-selling appropriate wealth solutions based on advisory based approach.
- To expand the Private Client Franchise by acquiring new High Net Worth (Private Banking level) customers via contacts, referrals and marketing initiatives.

Service

- To provide excellent customer experience to our Private Client customers at all touch points via 3 distinctive service elements ie cared for, excellent and enhanced value.
- To build sustainable relationship with Private Client customers by timely follow-ups and anticipate customers' needs.
- To proactively engage Private Client customers to achieve continuous customer satisfaction level.

Compliance

- To adhere to all related policies, regulatory risk and compliance matters including processes and procedures.
- To ensure no operational and control lapses.
- To ensure timely submission of both statutory and regulatory reports.
- To ensure adherence and compliance to all sales advisory, processes, and procedures.

Job Requirements

- Bachelor's degree, in any field, from an accredited university / college.
- Minimum 8 years' experience in financial industry with exposure in client relationship/ frontline role.
- Priority will be given to those with relevant licenses and certification (IPPC, etc); for those with module 12 and 19A is an added advantage.
- Possess strong understanding of both financial and non-financial markets, as well as excellent.
- Possesses own transport and willing to travel.
- Preferably multi-lingual.

Contact Person

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