



RESOLUTE PLANNING SDN BHD (202001017680) (“**RPSB**”), is a start-up progressive financial planning company licensed by the Securities Commission. We are resolute in our commitment to guiding our clients toward a future of financial stability, security, and prosperity. Through expert advice, personalized strategies, and a steadfast dedication to their financial well-being, we aim to build a world where everyone can confidently navigate the complexities of money management and achieve their life goals. Our mission drives us to continually innovate and provide our clients with the highest level of integrity, service, ensuring that each step on the path to financial success is clear and achievable.

RPSB would like to invite suitably qualified dynamic and motivated individuals for the following positions, to join the Company as we embark on our growth path.

Solutioning Executive

Job Description

Reporting to the Head of Financial Planning, the Executive will assist in supporting the Licensed Financial Planners in preparing clients’ documentation and maintaining proper records. This position requires someone who is interested in the financial planning industry, enjoys working in a technical and process driven environment.

Job Responsibilities

- Prepare financial plans for LFP clients.
- Follow up with clients on appointments and information.
- Assist in implementation of financial plans for clients.
- Events organisation.
- Coordination with product providers & LFPs.
- Ensure proper record keeping of all information in central depository.
- Stay updated on the latest regulations, practices, and financial products.

Requirements

- Must have the required regulator-recognised financial planning certification, preferably CFP® & IFP® with current membership with respective financial planning associations.
- Possess a recognized degree in Business Administration, Finance, Marketing or any equivalent academic qualification.
- Possess strong communication and interpersonal skills
- Competent in English and Bahasa Malaysia, Chinese is an added advantage.
- Must be dynamic with strong ethics and a client-centric attitude.
- Meticulous in work assigned and a good team player.
- 1 year experience in financial planning.
- Fresh graduates who have completed the CFP Certification Programme may also apply.
- We are seeking Bumiputra candidate with above requirement.

Remuneration will commensurate with experience. There are career growth opportunities for suitable candidates.

Please email your application and detailed resume stating qualifications supported by copies of full transcripts and experience, current and expected salary together with a recent passport-sized photograph to **hr@resolute-planning.com**. Only short-listed candidates will be notified.