



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. There will be career progression opportunities for suitable candidates.

LICENSED FINANCIAL PLANNER

Job Description

Help our clients meet their financial goals through investments, tax planning, estate planning and overall wealth management. Regularly review clients financial plan to ensure they are on-track. The incumbent must also use their competency in financial planning to make credible recommendations, guide and educate clients make informed decisions.

Job Responsibilities

- On-board clients and foster long-lasting relationships.
- Create strategic financial plans and budgets for clients.
- Evaluate clients' financial documents including their income, expenses, and liabilities.
- Recommend & implement suitable financial solutions.
- Monitor clients' needs and adjust their financial plans accordingly.
- Ensure you stay updated on the latest regulations, practices, and financial products.

Requirements

- Must have the required regulator-recognised financial planning certification, preferably CFP^{CERT}™ & IFP®
- Must have a current membership with Financial Planning Association of Malaysia or Malaysian Financial Planning Council.
- A recognized degree in Business Administration, Finance, Marketing or any equivalent academic qualification.
- At least 2 years of experience in financial planning or related industry with a proven track record
- Candidates with engineering, accounting, IT experience with keen interest in financial planning and have the CFP/IFP Certification can be considered.
- Possess strong communication and interpersonal skills
- Strong ethics, with a client-centric attitude
- Candidates who have passed modules 7 of the Securities Commission SIDC Licensing Examinations & IPPC from AICB will be an added advantage
- Must be dynamic, mature, self-motivated, and result-oriented.
- We are also seeking Bumiputra candidates who meet the above requirements.

Remuneration will commensurate with experience. 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 **rpsb@resolute-planning.com**. Only short-listed candidates will be notified.