iGM Wealth Planner

Job Description

iFAST Global Markets ("iGM") is a wealth planning division of iFAST Capital Sdn Bhd for iGM Wealth Planners to offer consumers personalised and unbiased financial solutions with complete transparency on commissions, fees and information on wealth management products.

Here at iGM, we believe in the Asset Accumulation model and the tenacity required to build the longevity of your advisory business. To be dedicated to a long-term career involves setting in place a sustainable business model and goals to achieve your continued success. We believe that our recurring income model will help build your future while our Fintech solutions can help you to manage your clients' portfolios more efficiently and effectively.

We understand the importance of client ownership. The client base and all accumulated assets you have built in iGM over time will remain yours and are fully transferrable wherever you go.

We are looking for someone who is: -

- Able to provide personalised financial consulting to clients and help clients to meet their needs and grow their assets.
- Able to recommend and grow clients' portfolios with a wide range of wealth management products, such as Unit Trusts, OTC-Bond, Discretionary Portfolios, Insurance and etc.
- Able to expand new client base and build a trusting relationship through your own capacity, network and business development activities.
- Willing to keep abreast of investment market trends and committed to continuous learning.
- Have patience in handling clients' issues, complaints, product enquiries and provide timely support to clients.
- Confident, professional, prioritise clients' interests, and has the drive to succeed.

Requirements: -

- Minimum 2 years of experience in Wealth Management, Banking, Investments, Unit Trust, Insurance, or Financial Planning industry.
- Self-motivated, positive and resourceful.
- Good planning and organizing skills as well as good learning attitude.
- Excellent communication and interpersonal skills.
- Client-oriented, pleasant and pro-actively meeting customers.
- Strong interest in investment and insurance products.
- Professional certification such as CFP, RFP, ChFP or CMSRL holder will have an added advantage.
- Preferable candidates with experience as Private Bankers, Premier Bankers, Relationship Managers, Personal Financial Consultants (PFC) or Unit Trust Consultants (UTC) are encouraged to apply.
- Able to work independently and is a team player.
- Attractive remuneration structure.
- Application from existing iFAST partners i.e. CUTA and CPRA's representatives will not be considered.

Applicants are invited to email us a comprehensive resume with qualifications, skills and working experience, and expected salary to: The Human Resource Manager:
hrmanager.my@ifastfinancial.com

All applications will be treated in strict confidence. We regret that only shortlisted applicants will be notified. Applicants who have written to us earlier need not re-apply.

Note: Job responsibilities/requirements are representative and are not intended to be a detailed list. Other tasks/abilities may be required of the incumbent, relative to the specific assignment.