

## Wealth Vantage Advisory Sdn Bhd



# WEALTH VANTAGE

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.

### Salaried Advisor

Full Time Employee (Immediate)

Initial Monthly Salary: RM2,500

Location: Desa Pandan, Kuala Lumpur

*Reports to a Senior Advisor (Licensed Financial Planner) and perform tasks assigned by the LFP*

### Responsibilities

No	Key Areas	Tasks
1	Financial Advisory service: <ul style="list-style-type: none"><li>- Client Management</li><li>- Case Management</li><li>- Activity Management</li></ul>	<ul style="list-style-type: none"><li>o Attend all meetings with Clients/Leads together with Senior Advisor.</li><li>o Assists Senior Advisor in all administrative related tasks : e.g. instruction order, client database update and liaising with back office (Planning &amp; Solutions / Sales Admin) for outstanding cases</li><li>o Assist in Financial Planning related tasks e.g. fact finding, handover, meeting minutes, etc</li><li>o Salaried Advisors will not practice independently until they complete the first 2 years of service</li></ul>

### 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
- Career level: Entry level

- Years of Experience: 2 years and above
- Skills / Competency:
  - Good competency in English skills
  - Knowledge of Microsoft Office, Google Workspace (e.g. Gmail, Google Drive, Google Sheets)
  - Competency in follow-ups and follow through on cases / progress / activity updates
  - Ability to adapt and grow in a competitive environment

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### 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 shortlisted candidates will be notified.

**Wealth Vantage Advisory Sdn Bhd**

1-2, Jalan 2/76C, Desa Pandan, 55100, Kuala Lumpur

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