Client Advisor, Private Wealth

Job Description:

* Manage and develop existing High Net Worth (HNW) clients relationship for the purpose of client conversion or acquisition to increase Total Financial Asset (TFA) and clientele base
* Work in partnership with the Investment Advisor and other in-house subject matter experts to offer holistic advice and financial solutions to HNW client’s need
* Promote Bank’s products such as investment, deposits, loans, bonds, equity and trust products according to HNW client needs
* Keep abreast of market trends, financial news and of the latest industry developments

Requirement

* Degree holder, preferably in Finance or Business Administration
* Minimum five years of work experience in the financial industry, preferably in priority or private banking
* Strong knowledge of global economic, financial markets and political conditions, current affairs and the implication of these on clients' portfolios
* Must have already obtained these required license/ professional certificates / industry qualifications: CFP, FIMM, PCE, CEILLI, or Module 6 and 7
* Good interpersonal and communication skills
* High level of analytical and conceptual thinking
* Creative and results-oriented
* Able to work well under pressure, independent, and a good team player

Relationship Manager, Premier Wealth

Job description:

* To provide a complete range of investment products and services offering to meet the needs of affluent customers
* To develop new business opportunities
* Sell Maybank products and third party products and services
* To build and maintain close business relationships with High Net Worth (HNW) customers to provide value added investment
* To be involved in the operational and marketing activities of Premier Wealth Centre
* To review customer’s portfolio on a regular basis
* Handle all credit applications as well as the operational transactions within the permitted authority limit
* To be guided by Certified Financial Planner (CFP) rules and regulations in providing investment advice to affluent customers

Requirement:

* Minimum 2 years of experience in the sales related field
* Broad knowledge of Maybank Group’s products
* Possess good interpersonal and relationship building skills with strong self-assurance and confidence
* Must have strong balance of customer relationship management and result orientation
* Able to work under pressure, meeting tight deadlines, independent and a good team player
* Excellent interpersonal skills
* Must have already obtained these required license/ professional certificates / industry qualifications: FIMM, PRS, IPPC,PCE, TBE

Personal Financial Advisor

Job description:

* To carry out sales activities to increase sales revenue of basic products
*  To collaborate with lead generators at the branch
*  To attend to all leads provided by branch staff
*  To attend to walk-in customers to sell Bank’s products
*  To participate in sales campaigns and other promotional sales
*  Manage the relationship with a portfolio of 1,000 assigned customers, and grow revenue from these customers

Requirement

* Graduates with 1-2 years sales experience preferably in retail banking products, i.e. insurance, mortgage, cards, deposits, ASB
* Fresh graduates (degree/diploma holders) with strong interest in financial and sales advisory
*  SPM holders with at least 3 credits in any subjects or equivalent with up to 2 years related experience
*  Good understanding of the banking and Maybank’s products (especially insurances and investment products, mortgage, ASB financing, credit cards & deposit growth)
*  Knowledge in financial planning/ wealth management or retail/branch operations would be an added advantage
*  Excellent communication skills in English and Bahasa Malaysia
*  Preferably candidates with the banking licenses (PCE, CEILLI, FIMM, TBE, IPPC) – for mid-career.
*  Able to work under pressure, meeting tight deadlines, independent and a good team player

Insurance Advisor, Etiqa

Job description:

* Identify Financial Goal and KYC:
*  Conduct joint sales appointment with Relationship Managers/Personal Financial Advisors, to be properly briefed on customers’ background and formally introduced to the customers
*  To establish customers’ needs for Wealth related products and services based on background and conversation with customers
* Analyze and Evaluate Client’s financial objective:
*  Focus on the insurance/financial goal/need which client need from the perspective of :
* o Wealth Protection / Wealth Maintenance / Wealth Accumulation / Wealth Enhancement
* o Wealth Distribution
* o Wealth Diversification
* Develop Recommendation:
*  Provide relevant options/ alternatives to meet the client’s insurance/financial objectives
* Implement Recommendations:
*  Implement recommendations based on client’s instructions and needs
*  Ensure prompt actions are taken on the proposal processing
* Coaching and plan training activities for Relationship Managers / Personal Financial Advisors
*  Ensure constant product refresher activities for Relationship Managers / Personal Financial Advisors
*  Maintain confidence level in closing Wealth products proposition

Required criteria:

*  At least a Diploma in any field with preferably Bancassurance / Insurance sales experience.
*  At least 3 year(s) of working experience in the related field Preferably those specializing in Sales - Financial Services (Insurance, Unit Trust, etc) or equivalent
*  Proven good sales track record.