



## Associate Director – Wealth Planning

Heritage Trust Services is looking for a top-performing individual to pursue and expand relationships with private banks and intermediaries within the wealth management industry. Predictable, sustainable and profitable revenue growth requires constant, proactive demand generation and well-coordinated teamwork between a wide range of our professional staff and specialists. Reporting to the Executive Director, candidates should thus have an entrepreneurial spirit, relevant industry and professional services experience, and demonstrated selling attributes and techniques.

### Job Description:

1. Responsible for marketing and sales for trusts and cross-selling of fiduciary services offering within the Heritage Trust Group including Hong Kong.
2. Actively source for potential high net worth clients in collaboration with financial advisors, private bankers and other intermediaries.
3. Handles new trust enquiries, preparing presentation materials and proposals to new trust prospects or their intermediaries.
4. Liaises with legal and tax advisors, financial advisors, private bankers and other intermediaries with respect to the proposed trust structures to new trust prospects and maintaining excellent rapport with them.
5. Assists in preparing trust setup documentation, including but not limited to reviewing trust deeds and other ancillary documents, drafting letter of wishes and performing due diligence on relevant parties.
6. Prepares the requisite business acceptance documents to facilitate the Client's Acceptance Committee to consider and approve the proposed trust structure for new business acceptance.
7. Assists in setting up trust structures and incorporating underlying companies under the trust, opening of bank and investment accounts for the trust structures.

- December 2011 -

HERITAGE FIDUCIARY SERVICES PTE LTD  
50 Raffles Place #15-05/06, Singapore Land Tower  
Singapore 048623  
Tel: (65) 6533 0774 Fax: (65) 6533 0224  
Email: [info@heritagetg.com](mailto:info@heritagetg.com)

HERITAGE CORPORATE SERVICES (HK) LIMITED  
Unit 1604, 16<sup>th</sup> floor  
9 Queen's Road Central, Hong Kong  
Tel: (852) 2527 9396 Fax: (852) 2527 0762  
Email: [hkenquiry@heritagetg.com](mailto:hkenquiry@heritagetg.com)

**Disclaimer:** Whilst every effort has been made to ensure that the details contained herein are correct and up-to-date, they do not constitute legal or other professional advice. Heritage Fiduciary Services and Heritage Corporate Services do not accept any responsibility, legal or otherwise, for any errors or omission.



## Associate Director – Wealth Planning

### Requirements:

1. 3-5 years experience in financial and/or estate planning related work, preferably at a high quality professional financial services company or firm.
2. Must have technical competence in estate, tax, retirement, insurance, investment and cash flow/capital needs planning analysis.
3. Experience in sales and/or Business Development.
4. Resourcefulness in finding creative solutions.
5. Outstanding communication skills are a must, as this position involves meeting with clients and prospects on an almost daily basis.
6. CPA or LL.B, STEP preferred

Interested applicants, please write in to our HR Department at [hr@heritagetg.com](mailto:hr@heritagetg.com).  
(Indicate Associate Director – Wealth Planning as the subject)

[www.heritagetg.com](http://www.heritagetg.com)

- December 2011 -

HERITAGE FIDUCIARY SERVICES PTE LTD  
50 Raffles Place #15-05/06, Singapore Land Tower  
Singapore 048623  
Tel: (65) 6533 0774 Fax: (65) 6533 0224  
Email: [info@heritagetg.com](mailto:info@heritagetg.com)

HERITAGE CORPORATE SERVICES (HK) LIMITED  
Unit 1604, 16<sup>th</sup> floor  
9 Queen's Road Central, Hong Kong  
Tel: (852) 2527 9396 Fax: (852) 2527 0762  
Email: [hkenquiry@heritagetg.com](mailto:hkenquiry@heritagetg.com)

**Disclaimer:** Whilst every effort has been made to ensure that the details contained herein are correct and up-to-date, they do not constitute legal or other professional advice. Heritage Fiduciary Services and Heritage Corporate Services do not accept any responsibility, legal or otherwise, for any errors or omission.