



Director/Associate Director – Wealth Planner

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. Candidates should thus have an entrepreneurial spirit, relevant industry and professional services experience, and demonstrated selling attributes and techniques.

Job Description:

1. Plays a basic role in the sales process in acquiring relationships.
2. Achieves sales and referral goals.
3. Serves as a technical, marketing and developmental expert and resource on matters of estate and financial planning, both for prospects and client relationships.
4. Assists in the acquisition of new clients; retain, expand, and deepen existing relationships; and develop talent in yourself and other service partners.
5. Uses personal networking skills to identify and attract high net worth clients, and develop focused strategies to create and expand relationships with centers of influence.
6. Provides professional consulting / advisory services and solutions to clients through the development, delivery and implementation of financial planning: (estate, tax, insurance, option, investment, retirement).
7. Develops proactive, reciprocal calling and referral relationships with client relationship managers and sales officers to create planning strategies and opportunities for high net worth client base.
8. Develops and expand relationships with centers of influence, such as attorneys and CPAs, resulting in additional business opportunities.
9. Able to profile clients and then articulate concepts, in an understandable way.
10. Able to converse with clients, their advisors, and RMs convincingly.

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. Possess technical competence in estate, tax, option, retirement, insurance, investment and cash flow/capital needs planning analysis.
3. Advanced listening, written and oral communication skills.
4. Experience in sales and/or marketing.
5. Resourcefulness in finding creative solutions.
6. Outstanding communication skills are a must, as this position involves meeting with clients and prospects on an almost daily basis.
7. CPA or LL.M. preferred

Interested applicants, please write in to our HR Department at hr@heritagetg.com.
(Indicate Director/Associate Director – Wealth Planner as the subject)

www.heritagetg.com

- June 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

HERITAGE CORPORATE SERVICES (HK) LIMITED
Unit 1604, 16th floor
9 Queen's Road Central, Hong Kong
Tel: (852) 2527 9396 Fax: (852) 2527 0762
Email: 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.