

Title – Dealing Representative

Description

Are you passionate about connecting personally with customers to assist them in achieving their financial goals? Do you love exploring and understanding investment options that best suit customers' financial needs? If your answer is Yes, please read following job description and send us your resume.

In this role, you are expected to:

- Play a key role in advising customers of high-level financial solutions from a range of available investment products.
- Communicate with clients to learn about their needs and help them achieve their goals
- Increase customer financial confidence by providing personalized financial advice, answering customer questions, and addressing their concerns, raising matters as appropriate to team members or partners while maintaining confidentiality and accuracy
- Act as a point of contact for the frontline staff in handling customer problems
- Work closely with existing and prospective customers to provide financial reviews, discuss portfolio updates and suggest additional personalized solutions based on their financial goals
- Stay knowledgeable about emerging issues, evolving regulations and industry codes of conduct as well as participate in process improvement opportunities to protect the interests of the organization
- Be knowledgeable with all investment products on our product shelf in a reasonable period of time, and will be able to present to clients correctly
- Strive to achieve and improve service level agreements and productivity targets
- Ensure documents are prepared consistent with relevant regulations and in a way properly reflecting business intentions
- Participate fully as a team member, help build a positive and diverse work environment, willingly assist and mentor others in the completion of work activities, and address communication issues efficiently

Requirements

- Mandarin or Cantonese proficiency
- Secondary school diploma with over 1 year of relevant experience
- Completion of CSC Course, EMP, or LLQP
- Excellent customer service and strong relationship building abilities
- Entrepreneurial and collaborative spirit
- A self-initiator with strong organizational, planning and time management skills

Job Type

Full-time, Permanent

Salary: \$25,000.00-\$150,000.00 per year