

INTERNSHIP

Job Description

- Assist qualified/licensed financial advisors in preparing financial plans for clients.
- Assist to draft proposals for clients
- Handling and managing follow ups of new business cases
- Conduct product comparison across different providers
- Assisting in analyzing and comparing unit trust funds
- Assist to update company's monthly market outlook

Requirements

- Holding/Studying a Diploma/Degree/Professional programmes or qualification
- Preferable in finance and financial planning related programmes
- Good attitude and responsible character
- Previous working experience will be added advantage
- Self starter with good in communication and interpersonal skill
- Proficient in English

Bill Morrisons Wealth Management Sdn Bhd, Petaling Jaya, Selangor