



POSITION DESCRIPTION

POSITION TITLE:

Paraplanner

LOCATION:

MALAYSIA

PHILIPPINES

VIETNAM

ASW COMPANY OVERVIEW

AS White Global (ASW) is an Australian-owned company with offices in Sydney, Vietnam, the Philippines, and Malaysia. We are specialists in unified offshore staffing solutions and have been working in Southeast Asia for the past decade. Our ASW employees are part of our very special ASW family and culture, but also integrate into our client's brand and team – effectively you get two work families!

Working in our local ASW company culture means you will develop strong friendships and great support networks. You will be part of a positive and engaging environment, participate in team and company events, and have access to global training and development opportunities. In addition, you will get exposure working with our international clients and build on your existing skill sets.

CLIENT OVERVIEW

Our client is a well-known financial service firm that offers tailored solutions to assist their clients in making wise financial decisions. They are currently looking for a passionate **Paraplanner** that can join in a highly reputable firm that establishes good foundation to the customers and provide exceptional service to both the Principal Advisor and a high-net-worth client base.

CLIENT JOB DESCRIPTION

- Undertake detailed analysis of clients' current financial situation
- Develop strategies in consultation with the principal
- Produce high-quality, tailored advice documents
- Create complex financial models for multi-entity scenarios.
- Liaise with team members to ensure our service is delivered to a high standard
- Maintain compliance standards and licensee regulations.

QUALIFICATIONS AND EXPERIENCE

- Background in Finance, Investment or related fields
- A minimum of 3 years of work experience in the accounting, financial or investment fields
- 3 years of financial planning experience is highly regarded
- Exemplary written and verbal communication
- Familiarity with Xplan is a plus
- RG146 compliance is an advantage

ASW OFFERS

- Competitive remuneration
- We are experts in **Offshoring** partnerships. This means that you will be a trusted member of the ASW family, and get access to our great benefits, plus you also get to work directly with ONE of our clients as a part of their international team from the US, UK, Canada, Australia, New Zealand, and much more.



POSITION DESCRIPTION

- Premium Personal Insurance Package
- Great Paid Leave entitlements
- Free LinkedIn learning & Coursera account
- Stocked fridges and pantries - free coffee, cold beverages, snacks
- Our own ASW Toastmasters Club - perfect your English!
- A diverse, inclusive and supportive company culture
- Exposure to an international environment, working with people across Malaysia, Vietnam, and Australia
- Opportunity to collaborate and work with global clients and stakeholders
- Team outings, travel abroad opportunities, company parties/events, and other exciting activities
- Industry and role-related training
- Overtime is rarely required
- Ongoing career opportunities