



# POSITION DESCRIPTION

POSITION TITLE:

Financial Planning Associate

ADVERT TITLE:

Financial Planning Associate

LOCATION:

MALAYSIA

PHILIPPINES

THAILAND

VIETNAM

## ASW COMPANY OVERVIEW

ASW is creating the world's most talented international family through hiring and growing talent into long-term careers with Australian companies. ASW is a recruitment and talent specialist, that partners with Australian companies to help them build highly capable international teams. We enable Australian companies to meet their business goals by accessing and retaining premium talent in emerging markets and giving that talent the opportunity to grow, learn and develop. Together we embed international teams into respected Australian businesses, both functionally and culturally, to deliver enduring and transparent people solutions.

## THE OPPORTUNITY

Join a dynamic team at our partner company, a prestigious leader in Australia's financial sector, as a **Financial Planning Associate (Paraplanning)**. This is a unique opportunity to grow your career in a collaborative environment, working alongside top-tier professionals in financial advisory services.

In this role, you will work closely with a highly experienced **Senior Financial Advisor** based in Australia. Together, you'll craft tailored financial strategies to meet clients' needs. The Senior Advisor will guide you through the latest industry regulations, product offerings, and market trends, providing you with hands-on mentorship and real-world insights. You will be key in delivering comprehensive financial advice that ensures clients' financial security and growth.

## KEY RESPONSIBILITIES

- Coordinate the preparation of advice documents (e.g., Statements of Advice, Records of Advice) to ensure compliance with industry regulations.
- Oversee the implementation of advice, including product applications and assisting clients with forms and documentation.
- Liaise with third-party providers (e.g., lawyers, insurers, fund managers) on behalf of clients.
- Manage deadlines and turnaround times effectively.
- Research and compare products to provide the best client recommendations in advice documents.
- Ensure adherence to licensee policies throughout the advice process.
- Outsource complex documents to external paraplanners, managing quality, compliance, and timelines.
- Maintain relationships with external paraplanners and administrators, ensuring timely service delivery.
- Manage client relationships, ensuring prompt handling of queries and service excellence.
- Support Financial Advisors with administrative tasks (e.g., insurance quotes, research).
- Stay current with approved products and compliance standards.



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- Provide backup support to the team during absences to maintain smooth operations.

## SKILLS, EXPERIENCE & QUALIFICATION

- Bachelor's degree in business/finance discipline or related field;
- At least 3 years of working experience in Australian Financial Planning
- Financial planning, banking or insurance experience to assist with an understanding of delivering advice documents that suit client needs;
- Experience using Xplan or a similar financial planning software is nice to have.
- A Diploma in Financial Planning, or similar is a plus.
- Excellent communication skills.
- Adapt well to changing priorities, deadlines, and directions
- Keen to details

## ASW OFFERS

- We are experts in international partnerships. This means that you will be a trusted member of the ASW family, and get access to our excellent benefits, plus you also get to work directly with one of our clients.
- In our unique English-speaking environment, you can practice and enhance your English with peers and international client teams based in either Australia, UK, US or NZ.
- Get global access to Learning & Development programs.
- Great work-life balance.
- Competitive remuneration.
- Excellent medical benefits.
- Great Paid Leave entitlements.
- Company parties/events, future travel opportunities, and other exciting activities.
- Ongoing career opportunities.
- To find out what our people say about working at ASW, visit: <https://aswhiteglobal.com/careers/>