

Personal Assistant / Secretary

Responsibilities:

- Provide full spectrum of secretarial support to Executive Directors including but not limited to: wide range of administrative activities, arranging appointments, manage schedules and travel arrangements;
- Very organized to help maintain an effective digital and physical filing systems;
- Managing daily workflows and ad-hoc assignments timely and independently;
- Assist in the planning, implementation and coordination of the logistical aspects for meetings, seminars, workshops, special projects and events;
- Ensure strong internal communications between all function areas to enable efficient implementation and management of strategic initiatives;
- Assist in arranging recruitment interviews and follow up with business correspondents.

Requirements:

- Higher Diploma / Associate Degree or above in any disciplines with experiences in banking, insurance, sales and customer services industry is a plus;
- Well-groomed, presentable, independent and self-motivated with a strong sense of responsibility, reliable, organized, detail-oriented and able to work under pressure;
- Sensitivity to confidential matters required;
- Occasionally travel if needed;
- Good command of written and spoken English and Mandarin;
- Familiar with MS Word, Excel, PowerPoint and Chinese input;

Attractive salary and benefits package will be provided to the right candidate. Please send a full resume with contact telephone number and expected salary to candy.chan@ukf.com.hk asap.

Relationship Manager / Chief Relationship Manager

Responsibilities:

- Provide financial planning services to Asia high-net-worth clients.
- Promote investment, insurance and financial products for optimizing new business opportunities;
- Serve as a problem-solver for the client, helping them identify investment criteria, recognize and handle concerns that arise as consultation moves closer to decision;
- Manage operational risk and observe the relevant policies /guidelines and compliance requirements;
- Achieve business targets by identifying and fulfilling business opportunities;
- Deliver high quality customer service to clients, account opening and related services.

Requirements:

- Minimum 3 years working experience, with at least 2 years Insurance or Investment experience;
- Good team player, result orientated with strong customer service sense;
- Strong sales and customer orientation, with good communication and interpersonal skills;
- Strong self-motivation and ability to work under pressure;
- High level of customer centricity mindset with dedication to deliver exceptional quality services for clients;
- Good command of both spoken and written English and Chinese;
- Process with IIQE and HKSI qualifications;
- AFP, CFP/CFMP will be a definite advantage;
- Candidate with insurance, brokerage and banking experience in serving Chinese or Taiwanese nationalities in China and/or Taiwan is a plus.

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Vice President / Senior Vice President (Family Office)

Responsibilities:

- Build, develop and maintain institutional and high net worth clients in the region of South East Asia;
- Acquire new private wealth customers and grow high net worth customer base and special focus on the customers' financial analysis, protection and investment needs;
- Proactively build and maintain business relationship with HNWs who satisfy the suitability standard and those who meet the minimum AUM requirement;
- Formulate and implement business development plans to grow client base and AUM;
- Engage in networking activities within our group to enhance the customer referral effectiveness;
- Adhere to policies and procedures thereby protecting the business from financial and reputational risk.

Requirements:

- University degree in a related discipline OR professional qualifications such as AFP, CFP or CFMP is an advantage;
- Minimum 3 years of relevant banking experiences in serving high net worth individuals in private banks, retail banks & premier banking;
- Familiar with private banking/retail banking products, and good knowledge of wealth management products;
- Strong leadership, excellent relationship building and interpersonal skills;
- Team player, cheerful personality with strong sense of responsibility;
- Fluent in both English and Chinese, both spoken and written;
- Process with IIQE and HKSI qualifications; preferably SFC licensed representative of Type 1 & 9.

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