SKILLS FRAMEWORK FOR FINANCIAL SERVICES
SKILLS MAP- ASSISTANT WEALTH PLANNER

Sector	Financial Services
Track	Product Solutioning and Management
Occupation	Wealth Planner
Job Role	**Assistant Wealth Planner**
Job Role Description	The Assistant Wealth Planner supports client acquisition. He/She also helps to prepare materials for providing advice and recommendations to clients. He works in collaboration with other team members to provide customised services to meet clients profiles and needs. He handles after-sales support in servicing client needs, such as processing of documents and handling any additional queries that clients may have. The Assistant Wealth Planner is open-minded and results driven. He is confident and personable in nature to build rapport with clients.

Critical Work Functions and Key Tasks / Performance Expectations

Critical Work Functions	Key Tasks
Acquire and manage clients	Analyse succession plans and directions provided by senior team members
	Track wealth planning industry trends and developments
	Identify channels for sourcing new clients
	Assist in development of marketing materials for client segments
Advise clients on wealth planning services	Provide assistance in preparing recommendations that are tailored to clients needs and objectives
	Seek specialist advice as necessary based on clients profile and needs
	Execute changes to plans required based on instructions and client needs
Manage client lifecycle end to end	Gather client documentation and review for completeness
	Assist in preparation of client acceptance and onboarding procedure materials
	Draft necessary pitch books and client presentations corresponding to legal, trust and other documents
	Record client enquiries and ensure they are resolved or escalated
	Complete documentation required to process required instructions for client

Skills and Competencies

Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
Business Opportunities Development	Level 3	Communication	Intermediate
Customer Acceptance Checking and Onboarding	Level 2	Interpersonal Skills	Intermediate
Customer Experience Management	Level 3	Service Orientation	Intermediate
Customer Relationship Management	Level 3	Teamwork	Intermediate
Ethical Culture	Level 3	Problem Solving	Intermediate
Market Specialisation	Level 3	Decision Making	Intermediate
Product Advisory	Level 3		
Risk Management	Level 3		
Service Challenges	Level 3		
Stakeholder Management	Level 3		
Wealth Planning Administration	Level 3		

Programme Listing	For a list of Training Programmes available for the Financial Services sector, please visit: www.skillsfuture.sg/skills-framework/financial-services

The information contained in this document serves as a guide.

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