

JOB POSTING TEMPLATE

Date:	_____	Function:	<u>De La Sól</u>
Job title:	<u>Life Portfolio Manage</u>	Manager title:	<u>Center Director (CD), Business Development</u>

Job purpose

Life Portfolio Manager is the first line of service in a unique, hi-end and financially credible center providing one-stop service to Sun Life's existing and potential VIP customers. The daily activities of Life Portfolio Manager include insurance advisory, lead generation, sales commitment, branding and coordinating with frontline operation staffs to ensure smooth transaction and pleasure experience to customer.

Major accountabilities

Financial advisory and sales

- Achieve sales target assigned by Center Director, Business Development in compliance with company's process and local regulations
- Generate new sales by seeking and providing professional financial consultancy to individual customers on need-based
- Explore up-sales/ cross- sales opportunities from existing & walk-in customers based on their unfilled needs
- Actively generate sales leads to build up customer database through various sales/ business development activities/ channels
- Act as a life partner of the customers in tailoring the advisory with word-of-mouth approach

Customer Service

- Provide a one-stop service by offering customers financial solutions that met customers' multiple needs
- Build up rapport and maintain solid relationship with customers and internal operation staffs to provide good customer service and holistic financial solutions when needed
- Follow company's procedures and local regulations in implementing transactions during customer journey (customer onboarding, document submission, claim,..)
- Be accountable to handle customer's enquiry while ensuring the committed turn-around time

Branding

- Be an active ambassador to promote company, De La Sól and personal brands across channels in a professional way

Others

- Other tasks/ projects assigned by manager

Specialized knowledge and skill

- Selling and advisory skills
- Process & system oriented
- Diversified knowledge/ working experience in banking, insurance, investment, hospitality, education, beauty, art & culture

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- English proficiency (intermediate and above)
- Proficient in basis office software application (Microsoft Office)

4. Other requirements:

- Good communication and inter-personal skills
- Good customer service skill
- Self-motivated and able to work under pressure
- Can-do attitude and willing to learn & change behavior
- Be dynamic in networking and able to interact with people at different levels

Education and experience

1. Education:

- Bachelor's Degree, majoring in Banking, Business Administration, Marketing....

2. Qualification:

- Preferably obtain some basic life insurance qualifications

3. Experience:

- At least one-year experience in sales position, especially finance fields

Management scope

Total number of direct reports: 0

Total number of staff managed (direct and indirect): 0