



A career in insurance at HSBC Life provides you the best of two worlds - you can thrive as an insurance specialist as well as enjoy the advantages that come with being part of a leading global international bank.

Insurance is about people and the promises they make. Our team of experts help deliver on these promises by providing a wide range of life insurance products and services that meet the needs of our clients and by delivering great customer experiences across Asia-Pacific.

We are currently looking for experienced professionals to join us as **Wealth Management Manager**.

匯豐保險是一家世界一流的機構，您可以在這裡專注於事業發展，同時享受領先的全球性國際銀行集團所帶來的優勢。

保險服務以人為本，重視客戶許下的承諾。在匯豐保險，我們通過為整個亞太地區的客戶提供各種各樣的人壽保險產品和服務，幫助兌現這些承諾。

現在，我們正在尋找一個有經驗的專業人士，作為財富策劃經理，加入我們的團隊。

### **Principal Responsibilities** 工作內容

<ol style="list-style-type: none"><li>1. Identify and capture insurance business opportunities leveraging financial planning methodology to ensure fair outcomes for all types of customers</li><li>2. Engage end to end wealth planning service including customer needs identification, solution recommendations, application fulfillment, and follow up</li><li>3. Provide specialist advice on appropriate wealth planning solutions to meet the family protection, education, retirement and legacy planning needs</li><li>4. Delivering against performance expectations across customer engagement, financial planning and new business KPIs</li><li>5. Manage individual portfolio to ensure the highest rate of customer satisfaction through post-sales and ongoing customer engagement</li><li>6. Proactively support team leader to collaborate with business referral partners, including but not limited to retail branches, third party organizations, intra-group referral</li></ol>	<ol style="list-style-type: none"><li>1. 運用財富規劃理念，洞悉並捕捉保險業務機會，以客戶需求為導向，研究財富管理策略</li><li>2. 為客戶提供全面的財富規劃服務，包括識別客戶需求、方案建議、完成申請及後續追蹤</li><li>3. 為客戶提供財富規劃方案專業建議，以滿足客戶在家庭保障、子女教育、退休計劃及財富傳承上的需求</li><li>4. 全方位達成客戶聯繫、財富規劃和新業務指標等各類業績目標</li><li>5. 有效管理業務，通過高質量的售後服務獲得最高的客戶滿意度</li><li>6. 積極協助團隊主管與業務轉介伙伴合作，包括但不限於分行、第三方機構、集團內轉介等</li><li>7. 建立積極正面的團隊文化，並確保個人與團隊活動遵守相關法律法規的要求，且符合匯豐的標準和規程</li></ol>
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7. Build and maintain a positive team culture among team members and broader organization. Ensure self and team activities comply with relevant legal and regulatory requirements and meets HSBC standards and procedures.

### Requirements 工作經驗要求

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| <ul style="list-style-type: none"><li>• University Degree Holder</li><li>• Holder of IIQE Paper 1 &amp; 3.</li><li>• Solid year of experiences of working experience in Business development, client servicing or distribution support within banking or life insurance settings</li><li>• Solid knowledge in Life Insurance Products</li><li>• Strong coaching skills and strong business acumen</li><li>• Results orientated with emphasis on the delivery of exceptional quality services for customers</li><li>• Proficiency in Microsoft Office (Word, Excel, PowerPoint, Outlook, etc.)</li><li>• Fluent in English, Cantonese and Mandarin</li></ul> | <ul style="list-style-type: none"><li>• 持有大學學位或同等學歷</li><li>• 需持有有效保險中介人資格考試卷一和三</li><li>• 有於銀行或人壽保險從事業務發展，客戶服務, 分銷等相關工作經驗</li><li>• 對人壽保險產品有透徹的了解</li><li>• 敏銳的商業洞察力及有能力輔導團隊</li><li>• 在企業戰略上有能力幫助推動與實施</li><li>• 熟練操作 Microsoft Office, 如 EXCEL, WORD 等</li><li>• 具有良好的溝通能力及創新思維，工作主動，團隊協作意識佳</li><li>• 流利的粵語和普通話</li></ul> |
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To be considered for this role, the relevant rights to work in Macau is required.

You'll achieve more at HSBC. To apply, please send your application together with you resume to our Human Resources Department via our email address: [hr@hsbc.com.mo](mailto:hr@hsbc.com.mo). Potential applicants will be contacted for selection tests and / or interviews.

考慮該工作職位的相關人士，必須享有於澳門工作的權利。

您將在滙豐取得更大成就。如欲申請上述職位，請將申請信函及個人履歷發送至本銀行人力資源部電郵地址: [hr@hsbc.com.mo](mailto:hr@hsbc.com.mo)。

HSBC is committed to building a culture where all employees are valued, respected and opinions count. We take pride in providing a workplace that fosters continuous professional development, flexible working and opportunities to grow within an inclusive and diverse environment. Personal data held by the Bank relating to employment applications will be used in accordance with our Privacy Statement, which is available on our website.



滙豐致力于建立使所有員工都受到重視和尊重的文化。我們為提供一個能夠促進持續的職業發展，靈活的工作以及在包容性和多元化環境中成長的機會而感到自豪。本行持有的有關就業申請的個人數據將根據我們的私隱聲明使用，該私隱聲明可從我們的網站上獲得。