Position: Wealth Planning Team - Associate  
Organisation: CTBC Bank Co., Ltd.  
Location: Singapore

Company Summary

CTBC Bank Co., Ltd. is amongst the largest privately owned banks in Taiwan. The predecessor of CTBC Bank Co., Ltd. (previously known as Chinatrust Commercial Bank, hereafter CTBC Bank) is China Securities Investment Corp., which was founded in 1966. In 1971, its name was changed to Chinatrust Investment Company Limited. In 1992, it was transformed into a commercial bank.

CTBC Bank has 3 major business divisions: corporate banking, retail banking and payment. Operations include deposits, loans, guarantees, foreign exchange, offshore banking units (OBU), trusts, private banking, wealth management, credit cards, securities, bonds, proprietary futures, derivatives, factoring, safe deposit boxes, electronic banking services, and the national lottery.

The bank has 150 Branches in Taiwan and 107 overseas branches and subsidiaries in USA, Canada, HK, China, Japan, Vietnam, India, Singapore, and Philippines.

Job Description

The successful candidate shall report to the Team Lead and assist him/her in areas of wealth planning platform management, including:

• Support the set up and management of relationships with Insurance Brokers and Trust Companies
• Support in developing new coverage for the wealth planning platform and the internal guideline review
• Support Senior Wealth Planner for the client event related to wealth planning topics  
• Manage Vendor Due Diligence application and review process  
• Manage insurance premium financing approval process and maintain records  
• Ensure adherence to Vendor Due Diligence guidelines and all related Wealth Management policies  
• Support Senior Wealth Planner to track revenues, provide MIS, pipeline and transaction reporting  
• Act as liaison point for all Insurance and Trust related activities

Job Requirements

• Bachelor’s degree fresh graduates or graduates with 1 or 2 years relevant work experiences
• Having motivation in life insurance, individual tax, trust and estate planning
• Attention to detail and concern for accuracy
• Motivated team player with strong work ethic
• Outgoing and strong inter-personal skills
• Good communication skills
• Fluent in Mandarin, especially speaking and reading (Traditional Chinese better)

Application

To apply, please submit your detailed resume to NBSAlumniOffice@ntu.edu.sg
Only shortlisted candidates will be notified.