

# **The Hongkong and Shanghai Banking Corporation Limited**

## **Wealth Planner**

**The health and safety of our employees and candidates is very important to us. Due to the current situation related to the Novel Coronavirus (2019-nCoV), we're leveraging our digital capabilities to ensure we can continue to recruit top talent at HSBC. As your application progresses, you may be asked to use one of our digital tools to help you through your recruitment journey. If so, one of our Resourcing colleagues will explain how our video-interviewing technology will be used throughout the recruitment process and will be on hand to answer any questions you might have.**

### **Some careers grow faster than others.**

If you're looking for a career that will give you plenty of opportunities to develop, join HSBC and your future will be rich with potential. Whether you want a career that could take you to the top, or simply take you in an exciting new direction, HSBC offers opportunities, support and rewards that will take you further.

HSBC Private Bank seeks to be the leading international private bank for business owners and their families. It provides clients with wealth, business and family succession solutions in the largest and fastest growing markets around the world. At HSBC Private Bank, we put our clients at the centre of everything we do.

We are currently seeking a high calibre professional to join our team as a **Wealth Planner**.

### **Principal Responsibilities**

- Comprehensive guidance of High Net Worth Individuals particularly from Asia, with consideration to all aspects of wealth planning
- Understand clients' needs and recommend suitable wealth structuring solutions to meet those needs
- Monitor trends in the wealth planning industry and the respective regions, make sure these are communicated via Private Wealth Solutions and implement necessary changes in order to achieve the long term goals of the individual and his or her family
- Review and draft necessary pitch books and client presentations, corresponding legal, trust and other documentation
- Ensure on boarding the right clients according to Global Standards
- Close collaboration with HSBC Private Banking and or group affiliates providing the Private Wealth Solutions proposition and enable them to grow their client base
- Support Global Private Banking through structured account planning with Relationship Managers and Investment Counsellors

### **Qualifications - External Requirements**

- Degree holder in law, business or tax, preferably with the Society of Trust and Estate Practitioners and Chartered Public Accountants qualification
- Experience in law firms, financial institutions, family office or independent trust companies with trust experience
- Solid experience in client relationship management with legal and tax professional exposure
- Fluent written and spoken English. Ability in speaking Cantonese, Mandarin or other Chinese dialect would be an advantage

- Travelling is required on need basis
- Good interpersonal skills
- Able to work independently with minimum supervision and detail oriented

The Role Holder at times may be in a position of conflict of interest, or perceived conflict of interest, and must follow HSBC group and, where applicable, any local regulatory guidance relating to conflicts of interest, and must take appropriate measures to mitigate/manage such conflicts when they arise. Such action may include declaration of such conflicts to management and Compliance, non-participation in discussion and abstaining from voting of matters in respect of such conflicts. When involved in making decisions relating to existing or prospective trust and fiduciary structures, the Role Holder must always ensure the fiduciary duties are paramount and must act in the best interest of the trust and its beneficiaries or beneficial owner. All potential conflicts of interest must be recorded in the relevant location's conflict of interest register.

**You'll achieve more when you join HSBC.**

[www.hsbc.com/careers](http://www.hsbc.com/careers)

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.

Issued by The Hongkong and Shanghai Banking Corporation Limited.