

IPPFA Administrative Executive (Full-time)

Company Information

Company: IPP Financial Advisers Pte Ltd www.ippfa.com

Department: Wealth Advisory

Industry: Financial Services / Wealth Management

Location: Singapore (Hybrid/Office-based depending on team arrangements)

Job Description

The Administrative Executive provides administrative and client servicing support to Wealth Advisory Professionals to ensure efficient business operations and a high standard of client experience.

1. Business Acquisition

- Generate Insurance & Investment Policy Illustrations (PI).
- Prepare application forms and supporting documents.
- Input and maintain client information in:
 - Fact Finder (FF)
 - Financial Needs Analysis (FNA)
 - Choice Form (CF)
 - Written Financial Plan (PLP)
 - Insurance & Investment Policy Summary
- Liaise with insurance companies, investment platforms and clients regarding outstanding requirements.
- Monitor application progress to ensure timely processing.

2. Business Servicing

- Prepare weekly follow-up reports on:
 - New business application status
 - Premium due notices and renewals
 - Client servicing requests
- Assist with insurance claims.
- Process investment transactions (Buy / Sell / Switch).
- Maintain accurate client records and administrative databases.

3. Administrative Support

- Prepare presentation materials.
 - Coordinate client seminars, workshops and appreciation events.
 - Prepare festive mailers such as New Year cards and calendars.
 - Perform general administrative duties assigned by the advisory team.
-

Job Requirements

- Diploma or Degree in Business Administration or related disciplines.
 - Fresh graduates are welcome to apply.
 - Good organizational and time management skills.
 - Detail-oriented with strong accuracy.
 - Good communication and interpersonal skills.
 - Proficient in Microsoft Office (Excel, Word and PowerPoint).
 - Able to multitask and work independently.
 - Prior experience in financial services, insurance or banking is an advantage but not required.
-

What We Offer

- Comprehensive on-the-job training.
 - Friendly and supportive work environment.
 - Exposure to the financial advisory and wealth management industry.
 - Opportunities for career progression.
 - Flexible working arrangements (where applicable).
-

Position Details

Job Title: Administrative Executive

Employment Type: Full-time

Salary: S\$2,300 – S\$2,500 per month (*commensurate with qualifications and experience*)

Working Hours:

- Monday to Friday
 - Office Hours (Flexible arrangements may be available)
-

Contact Person

Hiring Manager: Seah Li Wei

Designation: Wealth Advisory Professional

Email: seahliwee@ippfa.com

Mobile: +65 96287943

Application Process

Interested applicants are invited to submit:

- Updated Resume
- Earliest Availability

Shortlisted candidates will be contacted for an interview