



Standard Financial Planner Sdn Bhd

Testimonials

Don't just take our word for it ...





Successful



Read what our existing advisers say about us...

"The decision to commit myself in 2006 to embark on a career in financial planning with Standard Financial Planner (SFP) is one of the best career decisions I have ever made.

SFP, with very strong support from Professional Investment Services, has shown us the very successful business model. There is a three fold business income stream for the advisers, in addition to the direct fees/commission received from clients ie. (a) Equity partnership (b) Ongoing income through trailer fees (c) Growing a business asset with the ability to sell in the future.

In addition, SFP has a comprehensive system to assist advisers to be successful through working with accountants, lawyers, state managers, service providers and fund managers at regular client seminars, training and conferences. This support network provides the advisers with an excellent platform to practice a systematic and holistic approach in writing plans and achieving financial goals for clients.

Personally, I have benefited tremendously as a licensed financial adviser with the SFP network and was recognised as the top adviser in 2006, 2007 and 2008. In addition, I was rewarded with an equity partnership with SFP and my business income has grown beyond my expectation.

To be successful, one needs to begin with the end in mind and work towards what you have perceived. As the saying goes, without vision people perish. SFP has given us the vision."

Karen Lee Lee Chin (Penang)

CMSRL/A3459/2007

Financial Adviser Representative (FAR)

Member since December 2005

"Joining SFP was a rewarding move and I have no regrets whatsoever. Making the switch from being a tied agent to a financial advisers has been a fantastic transition. Furthermore, we are given the authority to manage our associates even though there is a framework in place, such cannot be said under the tied agency structure. My associates and I are not pressured to maintain our position year in year out, but only to focus on building our business. It is the motivation to succeed that drives us.

I always believe in building an asset for myself, and what SFP is offering is essentially two assets. The feeling of ownership is far different from just focusing on obtaining more commission and awards.

With SFP, I can keep adding to my product range, we can complete our work with liberty and we are able to tailor plans for our clients. When we talk about tailoring the plans, we are looking at a closing ratio of close to 80% and above because the ownership of the plans lies in the hand of the clients, not us. Thus, the retention held by SFP is worth more than I could have ever imagined.

Finally, although working alone in Terengganu can be lonely at times, the fact that I know I am in for a great ride with a company which has a global presence makes it all worthwhile. The excitement should not be concealed, it must be shared with those who are still in the dark."

Lawrence Tan Sau Poh (Kuala Trengganu)

CMSRL/A3459/2007

Financial Adviser Representative (Pending)

Member since October 2005

"When I was first introduced to the idea of integrating financial planning into my tax and accounting practice, I was puzzled. I wondered if it would actually work in Malaysia and if it would distract my businesses, especially client relationships.

In 2007 I attended an SFP conference. This allowed me to witness the proven track record and evidence that this system does in fact work. I told myself if other countries have initiated such practices, it would only be a matter of time before it was introduced in Malaysia, so my answer to take up the opportunity to be a pioneer in this industry was 'yes!'

Hence, I signed up with SFP in 2007 based on the understanding that SFP is under the supervision of its parent company, Professional Investment Services who have been industry leaders for 12 years. I knew that many valuable experiences could be shared and learned from joining SFP. I have complete faith that SFP will continue to guide me and assist me in ensuring I benefit indefinitely from my association."

Yeong Yow Weng (Penang)

CMSRL (pending)

Financial Adviser Representative (FAR)

Member since September 2007



Leaders





Vision



“Joining SFP as a pioneer in 2001 has provided a platform for me to move into the business of financial planning. I was so fortunate to meet the CEO of Professional Investment Services, Mr. Robbie Bennetts, he shared with us the highly successful Professional Investment Services business model. It was an eye-opener as it provides an opportunity for financial advisers to build their business assets, which you can't have as a tied insurance or unit trust agent. Since then, I decided to take my career to the next level by joining SFP.

As a member of the SFP network I receive ongoing support from the business development team. The parent company, Professional Investment Services is positioned as the largest financial dealer group in Australia and through SFP, they transfer their vast experience, intellectual property and practical skills to enhance my business. With the high compliance standards and the structured approach, clients are impressed with my professionalism and feel comfortable placing their trust in me.”

Wong Keng Leong (Kuala Lumpur)

CMSRL/A3308/2007

Financial Adviser Representative (FAR)

Member since March 2002

“Joining SFP has provided a platform for me to build and move my business to the level of financial planning, which was initially only centred around estate planning. The multi-faceted approach in sourcing reputable and professional service providers enables clients to tap into a variety of products and services and has also enhanced my ability to provide comprehensive client solutions.

The local business development team, together with Professional Investment Services' vast experience, expertise and practical skills transfer, including seminars and conferences has helped in broadening and enhancing my knowledge and my business. The structured approach and compliance processes help in the running of my business, with the core focus of providing quality services to clients.

SFP's support when organising client seminars has made the dissemination of product knowledge and its mechanics far simpler for clients to understand. These seminars also assist clients in understanding how to match the diverse products and services to their needs. I am confident that SFP can continue to assist me in building my business with upfront remunerations and passive income.”

Tan Beng Wah (Jeremy) (Kuala Lumpur)

CMSRL/A3279/2007

Financial Adviser Representative (FAR)

Member since September 2003

“I am blessed that my daughters and son in law shared and supported my dream of setting up a financial planning practice. We pursued many different platforms but fortunately my son in law discovered SFP at a financial expo. At last we found an independent financial planning company who understands what we aspire to become and a company with international affiliations with one of the world's leading financial planning dealer groups, Professional Investment Services as its equity partner.

SFP fits the profile of a company I want to associate myself with, one that I can grow professionally with and one that is deserving of my clients. I owe everything that I am to my past and with SFP I can be more in the future.”

Anizah Teo Ching Kim (Kota Kinabalu)

CMSRL/A3689/2007

Financial Adviser Representative (FAR) (Pending)

Member since March 2007

“Financial planning has been very close to my heart as I was personally involved in a journey where my family were left stranded when my mother was diagnosed with cancer. We were not prepared financially or emotionally for the loss.

At that time, our world would have been different if there was a compassionate, caring and professional adviser in the picture. I believe SFP is the nurturing ground for such a person. Passion fuels the soul for continuous development and SFP nurtures talent to the highest potential. With Professional Investment Services international presence and vast experience, it will continue to enhance its business support in both the local and international scene.

Besides the business element, I enjoy the friendships I have built with different practitioners in various countries. We are definitely a group of people who work hard and play hard....this spices up the true flavour of the ultimate 'financial advisers'.”

Brenda Yong Sook Kwan (Kuala Lumpur)

CMSRL/A9249/2008

Financial Adviser Representative (FAR)

Member since June 2007



Passion



Training





Standard Financial Planner sdn Bhd

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