

50 reasons to join Wizard Agency

Wizard Financial Group with visions and experiences

1. We have the vision to reach 1000 Quality Agents with HK\$300 million business
2. We are very experienced, well established since 1983.

Wizard Financial Group with outstanding achievements

3. We are “Prudential Asia No. 1 Agency”
4. We are the biggest team in the company with 370 agents (in 2006)
5. We grew 6 times (no. of agents) in 10 years
6. We have the highest no. of new recruits every year
7. We have the most International GAMA awardees in the company
8. We have the most International Dragon awardees in the company.
9. We have the most IQA International Quality Awardees in the company
10. We have the most Travel incentive qualifiers every year in the company
11. We are 6 years continuous champion agency in the company (2000-2005)
12. We are the only one agency with over HK\$100 million/year production.
13. We have partners qualified the most of Champion Case Count of the company
14. We qualified most times (7 times) DMA (Distinguished Manager Award)

Wizard Financial Group with professional team power

15. We have CPA in our team
16. We have lawyer in our team
17. We have CFA in our team
18. We have highest number of COT (MDRT Court of the Table)
19. We have the most MDRT
20. We have over 40% University graduates
21. We have the most university interns
22. We have the most Master degree holders
23. We have the most Branch managers

Wizard Financial Group with fully supports on marketing and recruitment

24. We have our own Recruiting VCD for recruitment support
25. We have two monthly recruitment events held in hotel
26. We have own Agency web site since 2000
27. We have the 1st book in the company featuring the top agents which is published by Sing Tao Publisher.
28. We have a road show team organizing road shows every month in shopping mall

- 29. We have employed PR Company as partner for brand building and marketing
- 30. We have employed IT company as partner for web and soft ware development

Wizard Financial Group with fully supports on administration

- 31. We have most secretaries to provide secretarial support

Wizard Financial Group with professional trainings

- 32. We provide comprehensive training (52 sessions) every week for new agents in first year.
- 33. We have CFP trainers in the training sessions.
- 34. All new agents are trained by experienced senior managers.
- 35. We have 100+ VCD of all the training sessions.
- 36. We are the only agency with Professional Coach employed in the agency.
- 37. We are the only agency with Professional Training Consultant employed in the agency
- 38. We have 100+ pages Annual Agency manual published every year.
- 39. We have developed many interactive soft wares for sales presentation.
- 40. We have telemarketing call centre support team.
- 41. We organize monthly client seminar delivered by lawyers in conference room of law firm.
- 42. We have a High Profile Market team targeting at high net worth client marketing.
- 43. We have “Will writing” tool to enable agents to do financial planning for clients.

Wizard Financial Group with “Appetent but Aggressive” working spirit

- 44. We have highest number of Christians
- 45. We are a warm family with friendly environment.
- 46. We have top sports team including Basket ball team, Football team, Dragon boat team, Badminton team.
- 47. We provide all services free of charge or at very minimal cost.
- 48. We are a partner of “JS alliance” (7 agencies in the company joining together).
- 49. We were the top fund raising team for WER (World Emergency Relief) 11/11 fund raising campaign in 2005.
- 50. We are simply the BEST!

50個加入智者理財的理由

擁有夢想及經驗：

1. 我們的夢想是建立一支擁有1,000位優秀保險顧問的團隊，並創造3億港元的營業額
2. 成立於1983年，我們經驗豐富

創造驕人成績：

3. 我們是「保誠亞洲第一團隊」
4. 規模：2006年，我們擁有370位保險代理，是企業內的第一大營業區
5. 高增長率：這10年內，我們的代理人數達6倍之增長
6. 我們每年聘請最多的新入職者
7. 我們有最多GAMA人壽保險經理協會國際榮譽得獎者
8. 我們有最多國際龍獎（International Dragon）(14位)得獎者
9. 我們有最多國際優質獎（IQA）得獎者
10. 我們每年有最多的代理取得公司旅遊大獎
11. 2000-2005，我們連續六年成為公司的冠軍營業區
12. 我們是唯一每年創造超過一億元萬港元營業額的營業區
13. 我們的代理贏得公司最多次(11次)最多保單冠軍
14. 我們贏得最多次(7次)傑出人壽保險經理獎（DMA）

團隊專業化：

15. 我們的團隊有執業會計師（CPA）
16. 我們的團隊有律師
17. 我們的團隊有特許財務分析師（CFA）
18. 我們的團隊擁有最多之COT（即年度業績為百萬元桌會的3倍）
19. 我們的團隊擁有最多之百萬元桌會（MDRT）(30多位)
20. 我們的團隊超過40%為大學畢業生
21. 我們擁有最多大學實習生
22. 我們擁有最多碩士畢業生
23. 我們擁有最多分行經理

市場推廣及招聘支援：

24. 我們製造了招聘光碟以提供招募支援
25. 每個月兩次我們於酒店舉行招聘活動
26. 由2000年開始，我們建立了團隊的網頁
27. 由星島出版社出版，我們發行了保誠保險首本有關優秀保險顧問的書籍
28. 我們有專責隊伍，負責安排每月於購物商場所舉辦的路展活動，例如展銷/

招聘會

29. 我們聘請公關公司以協助品牌建立及市場策劃
30. 我們聘請電腦程式公司以協助發展網頁及軟件

行政支援：

31. 我們聘請最多的秘書以協助日常文書工作

新入職者的專業培訓及支援：

32. 我們均為首年入職的新成員提供最完善的訓練
33. 訓練課程中，我們會聘請特許財務策劃師（CFP）任教
34. 所有的新入職者都會由多位資深上級所帶領及訓練
35. 所有的訓練，我們製造了超過100隻光碟
36. 我們是唯一聘請內部專業教練的營業單位
37. 我們是唯一聘請內部專業訓練顧問的營業單位
38. 每年我們會印製一份超過100頁的保險代理年度手冊
39. 就銷售演說，我們已建立了多套互動軟件程式
40. 我們有電話銷售支援中心
41. 我們於律師行舉辦每月的客戶講座，並由執業律師主講
42. 我們有優質市場專責小組，專門負責跟進高資產之客戶市場
43. 我們有「遺囑編寫」工具以幫助保險顧問為客戶作理財計劃

團隊文化：

44. 我們是最多基督徒的團隊
45. 我們的隊員非常友善，團隊猶如一家人
46. 我們是公司最好的籃球隊，足球隊，龍舟隊及羽毛球隊
47. 我們免費或以最低成本，為員工提供各種不同服務
48. 我們是「聯合分行策略聯盟」的一員（由保誠7位營業總監所建立的聯盟組織）
49. 我們是「世界緊急援助(香港)」所舉辦的11/11助貧日活動，籌得最多善款之團體
50. 簡單而言，我們是最好的！