



PR/160314 | Associate, Policy Operation Support in Growing Consultancy Firm

Job Information

Recruiter

JAC Recruitment Malaysia

Job ID

1584346

Industry

Bank, Trust Bank

Job Type

Permanent Full-time

Location

Malaysia

Salary

Negotiable, based on experience

Refreshed

May 12th, 2026 07:00

General Requirements

Minimum Experience Level

Over 1 year

Career Level

Mid Career

Minimum English Level

Native

Minimum Japanese Level

None

Minimum Education Level

Associate Degree/Diploma

Visa Status

No permission to work in Japan required

Job Description

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- Manage the timely preparation and delivery of premium notices to clients.
- Prepare and distribute annual policy review packages within established timelines.
- Update meeting outcomes, action items, and status changes in the internal system following annual review sessions.
- Retrieve, verify, and input quarterly and annual cash values into the system accurately.
- Liaise with insurers to facilitate smooth transfer of required data, documentation, and client information.
- Respond to policy-related enquiries, providing clear and accurate information to advisors and clients.
- Prepare customised client presentations, policy summaries, and comparison reports to support advisory discussions.
- Handle ad hoc servicing requests, including generating CSV files, inforce illustrations, and other policy documentation.
- Maintain precise and up-to-date records across internal platforms and databases.
- Collaborate closely with internal teams to ensure efficient workflow and seamless coordination between Sales and Operations.

Job Requirements

- Degree holder in any discipline
- Highly organized and proactive in fulfilling daily work efficiently
- Ability to multi-task and work under extreme deadlines
- Competent in Microsoft Excel/Powerpoint/Word/Adobe Acrobat
- Proficient in English and Chinese in order to liaise with the mandarin speaking counterparties
- Min 1-2 years of working experience in shared service operations or customer service preferably in insurance industry

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#countrymalaysia

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Company Description