LWA

Let's Make A Difference In Life

IRMA

Your Personal Financial Architect

LEA

Your Goals, Our Excellence

Financial Planning hub

ADDRESSING THE NEEDS OF OUR CLIENTS AND PLANTING THE SEEDS FOR A SECURE FUTURE.

About Us

LWA

Lion Wealth Advisors Sdn Bhd (LWA) is the only one Financial Planning firm with Capital Market Service Licence issued by Securities Commission under the Securities Act and Corporate Unit Trust Adviser licence in Northern Region of Malaysia via the Federation of Malaysian Unit Trust Managers (FMUTM). LWA has often consulted by vary medias on the latest market emerge related to Financial Planning, such as the Money Compass magazine, Personal Money magazine and some Chinese newspaper.

LWA has developed a complete financial planning system which will assist our clients to recognize and premeditate their long term wealth planning in order to achieve a peace of mind and discover the freedom that come from having achieved financial security.

IRMA

IRMA stands for Independent Risk Management Advisors Sdn. Bhd. We are one of the pioneer integrated risk management firms in Malaysia. At present, there are 7 firms being registered as Licensed Financial Adviser with Bank Negara Malaysia. We are the only one in Northern Region of Malaysia.

As a Licensed Financial Adviser, IRMA enjoys the privilege of working with various large insurers in both life & general insurance. With a broader products supply on hand, we are able to deliver superior products and services that best suit our clients' current and/or long-term financial needs.

LEA

Lion Estate Advisors Sdn. Bhd. is an established estate planning firm in Northern Region of Malaysia, with innovative and cutting edge estate planning experience over 10 years.

The company's diverse services include Estate Distribution Planning, Simple Wills to Exclusive Wills, Declaration of Trust, Insurance Trust, Property Trust, Special Needs Trust, Private Purpose Trust, Maintenance Trust, Charitable Trust, Executor and Trustee Appointment, Estate Administration (Testate and Intestate), Powers of Attorney, Business Succession Planning, and more.

At LEA, we foster excellence in wealth care services by striving and maintaining highest standard of ***PIC;*** ***P***rofessionalism, ***I***ntegrity and ***C***onfidentiality. Over the years, we have helped many individuals, families and businesses in Malaysia to implement their goals and achieve results that secure efficient estate planning for their family and friends.

Our Vision

"To be the preferred one-stop Financial Planning & Networking Corporation in Malaysia and beyond".

Our Mission

"To establish entrepreneur networks that sharing common beliefs and values (Gratitude, Giving & Unity) via Financial Planning Processes. Add value to people's lives by creating wealth for everyone to share and enjoy".

Plan Your Financial Roadmap With Us

Financial Compass

In this highly regulated industry, we strive to:

- maintain high professionalism;
- protect consumer's interest;
- be independent;
- tailor customer's need
- preach our 3Gs value (Gratitude, Giving and Group Unity)

LWA, IRMA and LEA operate with a set of unique organizational structure. We have formed an alliance with Lion Team Advisors Bhd. (LTA) as one of their professional networks. LTA is a well known name in Northern Region of Malaysia which provides integrated professional financial and estate planning services. It also provides a network platform in professional advisory services from wealth protection, management, accumulation to distribution.

We provide a wide spectrum of professional financial planning and advisory services via in-house and network partners.

Our services:

- Financial Health Check
- Personal Financial Plan
- Enterprise Financial Plan
- Risk profiling
- Personal Policy Review
- Enterprise Risk Management Audit
- Insurance Planning
- Investment Planning
- Business Succession Planning
- Will Planning
- Estate Planning
- Cash Flow Management
- Retirement Planning
- Education Planning

Our Professional Services Referral:

- Business Incorporation
- Accounting Services
- Auditing Services
- Tax Advisory
- Company Secretarial Services
- Legal Advisory

OUR 3Gs VALUES:

Gratitude
Giving
Group Unity

OUR 3Is PRINCIPLES:

1. Independence
   - CUTA license
   - FA license
2. Interactive
   - Two-way communication in delivering results
3. Innovative
   Innovative product packaging

LWA
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~ Photo Gallary ~


VIPs at the Lounge


Equatorial Hotel Beautiful Lounge


Chatting...


VIPs...


A strategic partnership begins here...

IRMA CEO

VIPs...

VIPs at VIP lounge

Our team members

Strategic partners from fund houses

Ms. Lydia Ong, Penang Exco Member

Officiates the strategic partnership

Our honorable guests

Join us now……To find out more, please contact us at **04-3808855/3808856** or email to: ***lta@lta.com.my***