

EXCELLENCE
CREATES
ABUNDANCE.



HOLISTIC WEALTH GROUP

UNLOCKING EXCELLENCE

Illuminating Futures, Enriching Lives

Welcome to Holistic Wealth Group, your gateway to financial excellence. At HWG, we believe in a world where trust, innovation, and empowerment converge to illuminate the path to abundance. Our commitment is rooted in our vision, mission and our values that form the bedrock of our legacy.

OUR VISION:

Becoming the Beacon of Elite Wealth Management:
Illuminating Futures, Enriching Lives.

OUR MISSION:

At Holistic Wealth Group, our mission is to nurture and empower the brightest talents in wealth management, curating the most innovative and diversified portfolio solutions. With an unwavering commitment to our clients and a people-centric approach, we lead the transformation of the wealth management landscape in Malaysia and beyond. We illuminate the path to financial abundance, one client, one dream at a time.

OUR VALUES:



Trustworthiness

Building trust through transparency, reliability, and integrity.



Human-Centric

Prioritizing people's needs, well-being, and experiences.



Resilience

Demonstrating adaptability and strength in the face of challenges.



Innovation

Embracing creativity and forward-thinking to drive progress.



Value-Driven

Committing to delivering high-quality products or services that provide value to customers.



Empowerment

Enabling individuals and communities to achieve their full potential.



OUR LEADERSHIP



Dato' Chua Meng Min - The Visionary Leader

As our esteemed CEO, Dato' Chua brings over three decades of profound experience in the life insurance industry. His foresight and strategic acumen have set the stage for a new era in wealth management, leading us towards a future of innovation and enduring success.



Kathryn Khoo - The Strategic Dynamo

Kathryn Khoo, our COO and CFO, is a visionary leader passionate about sustainability. With expertise in organizational operations and customer service, she drives HWG's digital transformation. Spearheading initiatives like the Pisteuo Advisory, Auxano Capital portals and HWG Single Sign-On platform, Kathryn's strategic thinking and sustainability commitment make her a trailblazer in reshaping the wealth planning ecosystem.



Elsie Loo - The Driving Force

As our Chief Sales Officer, Elsie Loo brings over 20 years of insurance experience. With multiple awards and a lifetime Million Dollar Round Table (MDRT) qualifier under her belt, Elsie's 'get-it-done' personality makes her an indispensable part of our leadership trio.



OUR PHILOSOPHY - A HOLISTIC APPROACH

At HWG, we redefine wealth management by integrating a holistic approach that transcends traditional financial paradigms. Our commitment is to empower individuals, families, and businesses to achieve financial prosperity while nurturing their overall well-being.

THE HOLISTIC WEALTH HIERARCHY

The Holistic Wealth Hierarchy, a cornerstone of Holistic Wealth Group's philosophy, guides individuals through the stages of financial success, from establishing a robust foundation to legacy crafting. With HWG, navigate prudently, unlocking personal financial success and leaving a lasting legacy. Whether managing, protecting, accumulating, enhancing, or distributing wealth, our holistic approach ensures a purposeful financial journey for you.



Pisteuo Advisory Sdn Bhd

Pisteuo Advisory, a trailblazing marketing platform under the HWG brand since 2015, has evolved into a powerhouse with over 3,800 dedicated advisors. Serving a clientele exceeding 30,000 in East and West Malaysia, Pisteuo has reshaped the financial services landscape, emerging as a pioneer in trust service marketing solutions.

Powered by its sole principal, a distinguished leader in Malaysian private trust services, Pisteuo introduces innovative concepts like the groundbreaking Cash Trust. This unique approach, rooted in a rich historical tradition dating back to 19th-century England, distinguishes Pisteuo as a trusted innovator.

Services: Private/Family Trust, Cash Trust. Education Trust. Insurance Trust, and Islamic Trust.

Pisteuo Elite Sdn Bhd

Specialized in crafting tailored solutions for both family and business interests. Pisteuo Elite ensures enduring relevance for future generations. As the dedicated representative of one of the top private trustee in Malaysia, Pisteuo Elite excels in Private Trust and Fiduciary services, complemented by comprehensive estate planning offerings.

Provident Wealth Sdn Bhd

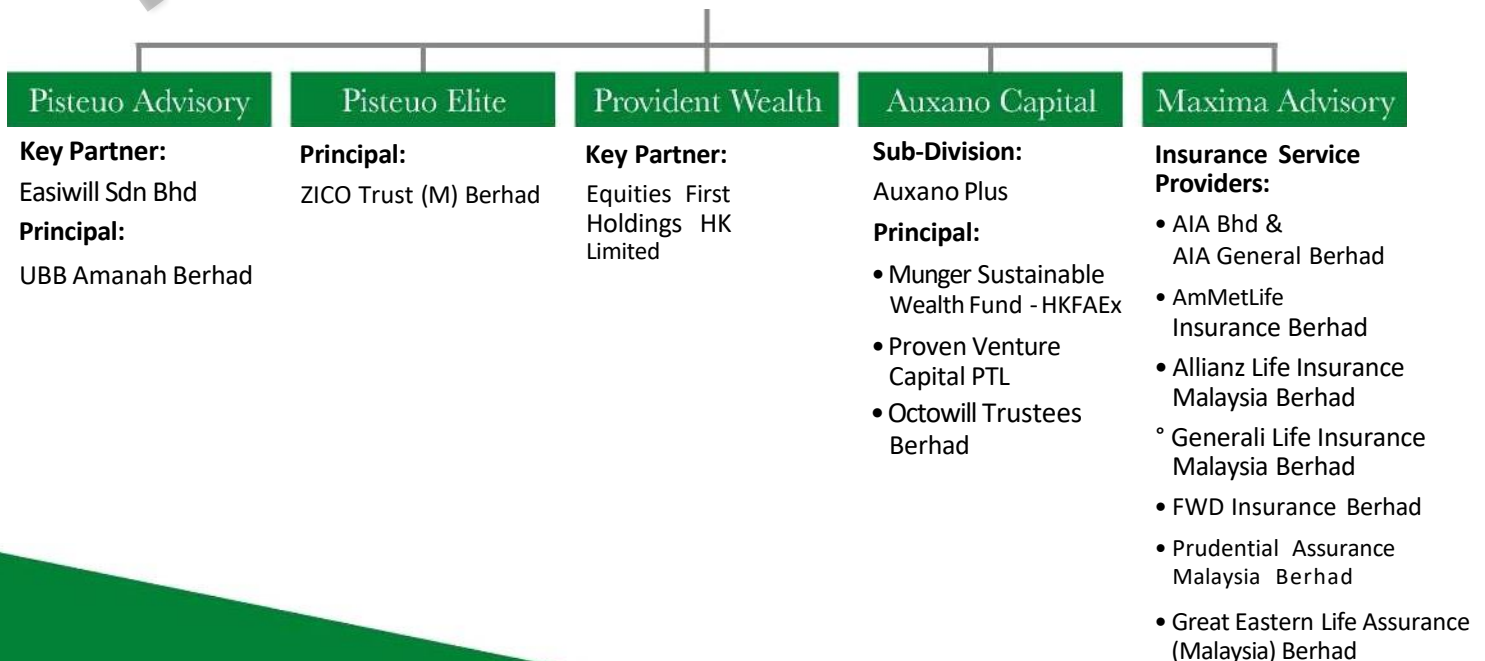
Provident Wealth provides referral for overseas funds from Hong Kong based asset management company as well as Corporate Advisory and Progressive Capital Services. These services are targeted at professional investors, high net worth individuals (HNWI), private entities or public companies who are more savvy in their investments and capital strategies for their businesses. All the funds are in USD and hence substantial gains were reaped in line with the increase in US currency against others.

Auxano Capital Sdn Bhd

Diversifying investments across venture capital funds and fixed income portfolios, Auxano Capital represents the companies that can fulfill those objectives. The strategic partnerships enhance Auxano's growing portfolio, offering Malaysian clients a range of investment opportunities across various industries.

Maxima Advisory Sdn Bhd

As a BNM approved FA, Maxima Advisory specializes in Holistic Wealth Management Solutions, offering a 100% commission payout model to its FARs. Collaborating with prominent insurance service providers, Maxima Advisory aims to become the first F.A. listed on the ACE or LEAP market by 2030, emphasizing innovation and growth within the financial advisory sector.



OUR COMMITMENT TO SUSTAINABLE EXCELLENCE

A Beacon of Sustainable Excellence

At Holistic Wealth Group, we are committed to achieving sustainable excellence by fostering a culture of trust, innovation, and empowerment. We believe that true wealth encompasses not only financial well-being but also personal growth, social responsibility, and environmental stewardship. Our unwavering commitment to these principles guides our every decision and shapes our approach to wealth management.

OUR PILLARS OF SUSTAINABLE EXCELLENCE

Trust and Transparency

We build lasting relationships with our clients by fostering an environment of trust and transparency. We are committed to providing clear and honest communication, adhering to ethical standards, and safeguarding our clients' interests.

Innovation and Adaptability

We embrace innovation and adaptability to stay ahead of the ever-changing financial landscape. We continuously refine our strategies, explore new opportunities, and leverage technology to enhance our service offerings.

Empowerment and Personal Growth

We empower our clients and team members to achieve their full potential. We provide personalized guidance, foster a culture of learning and development, and encourage individuals to take ownership of their financial goals.

Social Responsibility and Environmental Stewardship

We recognize the interconnectedness of financial well-being and social and environmental responsibility. We integrate ESG principles into our investment decisions, engage in philanthropic endeavors, and promote sustainable practices.

Our Commitment to a Sustainable Future

At Holistic Wealth Group, we believe that sustainable excellence is not just an aspiration but a necessity for long-term success. By upholding our core values and embracing innovation, we strive to create a positive impact on our clients, our community, and the environment. We are committed to shaping a future where financial prosperity aligns with social responsibility and environmental sustainability.

Let's create excellence together.

Connect with us:

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