



# DARREN TAN

FINANCIAL SERVICES GROUP DIRECTOR,  
FOUNDER OF PRIVATE CLIENT PLANNERS GROUP

Growing up in a family that didn't have much, Darren's education was heavily supported by his aunt. He realised how important his education was when he knew he could change his future through education. He believed that he couldn't choose the family he was born into, but he could always choose his future life.

Darren was majoring in mechanical engineering with the idea that he would have a stable job with financial security after he graduated. Only after his six-month internship that he decided that engineering was never for him. Pursuing a career in engineering would never lead him to the financial freedom that he was seeking. Hence, after graduating from university, he went straight into an industry that would help him achieve his goal in the shortest period of time - financial service industry.

As the founder of Private Clients Planner (PCP) group, Darren is continually guided by an important philosophy: Provide a Supportive, Inclusive and Productive environment where Conscientious Ambassadors of the wealth management industry can be nurtured to deliver bespoke services and solutions for our premium customer's benefits. He will make sure that when people plan their future with PCP group, they'll be guided by a progressive team of professionals motivated by the vision to build meaningful long-term relationships with every client.

He believes in treating others as he'd like to be treated - with utmost respect and care. This principle guides him and his company's search for like-minded Wealth Management professionals.

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# MECHANICAL ENGINEER WHO TURNED HIS LIFE AROUND

Through the lens of Darren Tan

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## How did you first met Peter Tan?

I met him in my university where he was teaching financial management in my university. What really caught my attention was his approach in teaching. He was very smart and showed a genuine interest to share his knowledge and to become a good mentor to his students.

## How has LDSY teaching improved your career?

LDSY has a very unique approach. It is not based on textbooks, but more about learning through experience. Peter often shared about his experience in the industry and how he viewed the work that we do as financial advisers. He was basically providing us with a model of reference, which cannot be found anywhere else but in LDSY.

## Has Peter's teaching changed your perspectives about what you do?

Yes, definitely. He always highlights the importance of long-term planning and being distinctively different in the industry. It is really important for me to understand his thought process behind his success, and this is something that a textbook cannot teach you.

## Why did you sign up for the Superstar Management Programme? What was your expectation?

I think this programme gives me a chance to really understand his thought process as a seasoned industry leader. I have been with Peter ever since I started my career in 2001. He started LDSY because he had retired from the industry and wanted to share his knowledge to the next generation of leaders. Hence, I signed up for the programme so I can continue to grow by learning from the best teacher and likeminded people.

## Did it meet your expectations? What have you achieved from it?

Yes, the programme has helped me plan for my next career move through a series of projects that we did together. I am a talent hunter. I look out for the right talents with certain characteristics to bring into the industry. By learning closely from Peter and being in this programme, I was given an opportunity to bounce off ideas with him and the team and came up with a new positioning for my career.

## How important is customer trust in the financial service industry?

Customers Trust is the essence of what we do here. We work in an environment where we feel supported, included and nurtured to continually deliver excellence to our customer's wealth management journey. Constantly bringing about an improvement of our customer's wealth management journey through the proper use of financial planning concepts. Ensuring that our customers' families are well positioned to ride on every milestone. Be they good or bad. Without the customer's trust, we are nothing. Where good people does financial planning for good customers. We are customers ourselves. We know how it feels like to be well-taken care of.

## What do you hope to see in your team members in the next few years?

My role is to see them to become the best CFO to their clients. At this stage of my life, it is no longer about my financial success, but more about my team's financial success. Productively, my team should be doing 10 million sales three years from now. We set our goal to impact 10,000 lives - first, we impact 100 agents' lives, then each agent will impact 100 lives.

## What's your goal for the next three years?

We aim to grow into a 100-member strong organisation of closely-knit, productive and conscientious advisers who individually builds a purposeful and significant relationship with their clients. We are values-driven. We talk about the importance of "Mission over Commission". For our Associates, we aim to bring about an advancement of their professional competence & quality of life.

## On a scale of 1-10, how would you rate yourself as a leader?

I would say I'm an 8. I would definitely have my own strengths in certain areas and also my blind spots. In terms of leading the team, I am quite strong at having the vision for the team and making things happen. I am not perfect in every area. So, for other areas where I am not good at, I will bring more staffs to fill in the gap.

## What is your vision and mission for PCP group?

Our vision is to deliver innovative and affordable solutions that provide protection and financial security to our valuable and privileged clients.

When we talk about our mission, we want to continue to nurture and empower a team of highly engaged and capable professionals to deliver fair, transparent and sustainable financial plans for our clients' needs. We provide the environment to help our associates build a meaningful business through mutual respect, trust and support.

## If you were to relive your career, what would you change or do differently?

I would not change much, but I would have worked harder. I became successful very quickly in my first three years of career, earning over 100,000 with a manager title. I reached the peak of my career within four years. So in only seven years, I already achieved what others would achieve in 20-30 years. However, these achievements made me feel content way too fast. So I would want to work harder even when I reached the peak of my career. Luckily, I have Peter who back then coached me and suggested me to get a higher education. Through my master degree, I gained new knowledge in a different industry - such as legal, which I eventually use to help my clients who need assistance in writing wills or setting up trust.