Client Associates
Private Wealth Management

Client Associates

Position Title:

Location: Delhi

About us:

Client Associates (CA) is India's First and largest Multi-Family Office Firm founded by Senior Private Bankers in 2002 to provide a professional platform of Private Wealth Management and Multi-Family Office services in India.

CA operates out of 11 offices across India, offering wealth creation across market cycles. With 23 years of solid track record, CA serves as a single window office for all solutions around the creation, management, and protection of wealth. CA has pioneered the family office concept in India and holds the widest access to the Indian wealth ecosystem.

Over the last 23 years of its journey, CA has grown to advice more than 1300+ wealthy families in India owning assets worth a few billion USD (~7 billion USD currently). Private clients and the industry recognize Client Associates at large as not only the Pioneers of Family Offices in India but also as one of the "Best Team of Private Bankers" in India; even larger than a few private banks in India, consisting of some brilliant minds and valued colleagues.

Highlights

- CA has an Open-architecture model i.e. No funds of our own.
- CA was awarded Best Multi-Family Office by AIWMI in 2018. It has been 5 times winner of the CNBC-TV18 Best Financial Advisors Award for 2015, 2014, 2012, 2009 & 2008. It also has been the winner of Citywealth Asian Family Office of the Year, 2011. It was ranked 2nd by Private Banker International as the Outstanding Wealth Manager for Family Office Services Globally for 2011 & 2009.

Position Overview

Job Description:

- Addressing queries raised during the telecons by building intelligence about the firm and its offerings.
- Understanding Multi-Family Office services worldwide and analysing their relevance for Indian clientele.
- Handling a portfolio of UHNI clients with the team leader after getting trained on the same, and helping with growing share of wallet of the client's total portfolio
- Responsible for market analysis in metro cities and tier 2 cities w.r.t expansion of business by prospecting the right segment.
- Planning for initial telecons with the prospects in consultation with wealth teams.

Candidate Profile:

- Should have Excellent Analytical, Problem Solving and Communication Skills and be a good team player
- Should be an independent, self-driven, goal oriented and entrepreneurial individual who is motivated by making a positive impact on the team and the organization by creating something new rather than being part of a structured team.

- Should be passionate about Wealth Management and impacting clients with thorough understanding of financial markets and asset classes.
- Should be relationship oriented with good inter-personal skills
- Should have a balanced personality with a good bend of patience and hunger
- Should have the DNA for client centricity and quality
- Should possess excellent literary skills and hands-on exposure of office tools like Excel, Word, PowerPoint, etc.
- Should be a self-starter, focused, goal orientated and a balanced personality with a good blend of patience and hunger

Compensation & Rewards:

- Larger Purpose of growing India's affluence by protecting and growing the wealth under advice
- Growth in compensation aligned with the individual and organisational performance
- Offer will match the market and the best which the individual deserves