Client Associates
Private Wealth Management

Job Title: Sr Analyst-Associate, Wealth Analytics

Department: Core Wealth Management
Location: Gurgaon, IN
Type: Full-Time, Individual Contributor
Reports To: Director/Executive Director, Wealth

About Us:

Founded in 2002, **Client Associates (CA)** is India's first and largest *Multi-Family Office*, committed to helping successful families manage, grow, and transition their wealth across generations. Built on the pillars of integrity, independence, and unwavering client focus, CA partners with UHNI and HNI families through a highly personalized and research-led approach to wealth stewardship.

Over the last 23+ years of its journey CA has grown to advice more than 1300+ wealthy families of India owning assets worth a few billion USD (~7 billion USD currently). Client Associates is recognized by private clients and the industry at large as not only the Pioneers of Family Office in India but also as one of the "Best Team of Private Bankers" in India.

Position Summary:

The roles will support the end-to-end management and monitoring of client investment portfolios. The ideal candidate is smart, highly trainable, detail-oriented, and intellectually curious, with a strong client-centric approach. This role requires analytical rigor, operational discipline, and the ability to work collaboratively in a fast-paced investment advisory environment.

Key Responsibilities:

Portfolio Analytics & Reporting

- Assist in portfolio construction, asset allocation reviews, and ongoing portfolio monitoring.
- Prepare periodic portfolio reports, performance summaries, and client review decks.
- Track portfolio deviations, cash flows, and rebalancing requirements.

Investment Research & Due Diligence

- Support the evaluation of investment products across asset classes (MFs, AIFs, PMS, fixed income, etc.).
- Assist in preparing notes, comparisons, and analysis for internal discussions and client recommendations.
- Maintain updated knowledge on market trends, macro events, and product developments.

Client Servicing & Coordination

- Work with advisors to understand client objectives, constraints, and risk profiles.
- Coordinate with product teams, operations, and custodians for seamless client execution.
- Ensure timely resolution of client queries, documentation, and transaction requirements.

Operational & Compliance Support

- Ensure all portfolio actions are executed in line with internal compliance and regulatory guidelines.
- Maintain accurate data, documentation, and internal records.
- Contribute to process improvements and workflow optimization.

Qualifications {Required Experience, Skills & Attributes}:

- Bachelor's or master's degree in finance, Commerce, Economics, or related disciplines.
- 1–3 years of experience in portfolio management, investment advisory, wealth management, or financial research.
- Pursuing or holding certifications such as CFA, CFP, NISM is a strong plus.
- Strong analytical and quantitative skills.
- High learning agility and eagerness to absorb new concepts.
- Excellent attention to detail and problem-solving ability.
- Strong communication and presentation skills.
- Client-first mindset with professionalism and discretion.
- Proficiency in MS Excel, PowerPoint; familiarity with financial tools is a plus.

What We Offer:

- Opportunity to work with one of India's most respected Multi-Family Offices.
- Exposure to sophisticated investment products and bespoke client portfolios.
- A culture rooted in integrity, learning, collaboration, and long-term relationships.
- Mentorship from seasoned wealth advisors and a clear path to professional growth.
