

Client Associates

Position Title: Vice President/Associate Director/ Director
Location: Pan India
Experience Level: 15 Years or Above
Education: MBA Finance or equivalent
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 services in India. We are registered with SEBI as both distributor of financial products and advisor on financial assets.

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.

Client Associates is awarded Best Multi Family Office by AIWMI in 2018. It has been 5 times winner of 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.

Website: www.clientassociates.com

<https://www.linkedin.com/company/796018/admin/feed/posts/>

Job Description:

- New Client Acquisition
- Asset allocation analysis & Financial Planning
- Handling a portfolio of UHNI clients with the team leader
- Growing share of wallet of the client's total portfolio (AUM/AUA)
- Understanding the client's needs and be able to advise effectively on portfolio decisions and suitable investment ideas
- Portfolio monitoring and analysis by leading the process directly or with a team of portfolio analysts
- Collaboration with Non-wealth in-house teams like Real estate, Lending Solutions (mortgages), Investment Banking (private transactions, fund raise, etc) and through partner platforms in Estate planning (Succession, wills,

trusts, etc) , private placements and other ancillary offerings (insurance, international investment opportunities, etc.)

- Owning transaction execution and management

Candidate Profile:

- Candidate should be full time MBA/PGDM, with specialization in Finance with relevant work experience
- Should have thorough knowledge of financial markets and different asset classes
- Should preferably carry his/ her own base of clients who can be introduced to the Client Associates proposition
- Should have an excellent network of clients and prospects who can be tapped for business
- 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 have a balanced personality with a good bend of patience and hunger
- Should be passionate about Wealth Management and impacting clients
- Should be relationship oriented with good inter-personal skills
- Should have the DNA for client centricity and quality
- Should have considerable skills in office tools like Excel, PowerPoint, etc.

Compensation & Rewards:

- Opportunity to work with an employee centric, growth oriented, progressive and forward-looking team
- 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