About the Company
Eton Solutions is a hypergrowth fintech transforming the Family Office segment of the Wealth Management industry. Eton's AtlasFive® is a comprehensive enterprise management platform specifically designed to allow today's modern Family Office meet the unique and varied challenges of Ultra High Net Worth families.

For More details visit: https://eton-solutions.com/

Job Title: Client Relationship Manager – Capital Markets & Wealth Management

Job Summary:

We are seeking a dynamic and experienced Client Relationship Manager with expertise in capital markets and wealth management. The ideal candidate will be responsible for managing and growing client relationships, ensuring the delivery of tailored financial solutions, and acting as a key point of contact for clients. This role requires a deep understanding of capital markets, investment strategies, and wealth management principles to effectively address clients' needs and contribute to the firm's growth.

Key Responsibilities:

- **Client Relationship Management:** Develop and maintain strong relationships with high-net-worth clients, institutional investors, and other key stakeholders in the capital markets and wealth management sectors.
- **Advisory Services:** Provide clients with comprehensive financial advice and investment strategies tailored to their individual goals and risk tolerance.
- **Portfolio Management:** Collaborate with internal teams to oversee client portfolios, ensuring alignment with their financial objectives and market conditions.
- **Market Analysis:** Stay abreast of market trends, regulatory changes, and economic developments to provide informed advice and identify new business opportunities.
- **Stakeholder Engagement:** Act as a liaison between clients and various internal departments, ensuring seamless communication and service delivery.
- **Business Development:** Identify and pursue new client acquisition opportunities, leveraging industry networks and market intelligence.
- **Compliance & Risk Management:** Ensure all client interactions and investment strategies comply with relevant regulations and internal policies.
- **Client Education:** Conduct seminars, workshops, and individual meetings to educate clients on financial products, market conditions, and investment strategies.

- **Performance Monitoring:** Regularly review and report on the performance of client portfolios, providing recommendations for adjustments as needed.
- **Feedback & Improvement:** Gather client feedback to improve services and address any concerns or issues promptly.

Qualifications:

- **Education:** Bachelor's degree in Finance, Economics, Business Administration, or a related field. A Master's degree or relevant certifications (CA,CPA,CFA,ACCA) is a plus.
- **Experience:** 5+ years of experience in client relationship management within capital markets or wealth management.
- **Skills:**
  - In-depth knowledge of financial markets, investment products, and wealth management services.
  - Strong analytical, problem-solving, and decision-making skills.
  - Excellent communication, negotiation, and interpersonal skills.
  - Proficiency in financial analysis software and CRM systems.
- **Certifications:** Relevant industry certifications are highly desirable (e.g., CFA, CFP, Series 7, Series 63).
- **Attributes:** Client-focused, results-driven, proactive, and able to thrive in a fast-paced environment.

Benefits:

- Competitive salary and performance-based bonuses.
- Comprehensive health, dental, and retirement benefits.
- Opportunities for professional development and career advancement.
- A collaborative and supportive work environment.

Skills and Abilities and Other Characteristics:

- Enthusiastic team player who enjoys both strategic and hands on work
- Ability to analyze problems and develop creative solutions to complex product issues
- Strong interpersonal, communication, and the ability to work effectively with all levels of employees

Physical Work Environment:

- Office environment
- Open to work in night shifts 4pm- 1am.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice