Position: Operations & Client Service Manager

This is the "Engine" of the firm. They ensure the Boutique experience is flawless.

The Mission: To engineer a seamless "Back-to-Front" office experience. You are responsible for ensuring that every client interaction—from onboarding to reporting—is executed with 100% precision and discretion.

Key Responsibilities:

- **Onboarding Excellence:** Manage the end-to-end documentation for HNI and Corporate accounts (KYC, Mandate letters, Portal setups).
- **Execution & Reporting:** Liaise with AMC/Custodial partners to ensure error-free trade execution and generate quarterly "Executive Summaries" for clients.
- **Compliance Oversight:** Maintain strict documentation trails in accordance with PMLA and SEBI guidelines.
- **Boutique Hospitality:** Act as the primary point of contact for service requests, ensuring a high-touch, responsive experience that exceeds standard bank service levels.

The Ideal Candidate:

- **Experience:** 3–5 years in Wealth Management Operations or Client Service.
- **Credentials:** Minimum Graduate.
- **Skillset:** Obsessive attention to detail. If a decimal point is off, it should bother you.
- **Tech Savvy:** Proficiency in CRM tools, Portfolio Management Software, and advanced Excel.
- **Discretion:** A deep understanding of the confidentiality required when handling institutional data and family wealth secrets.