

Position: Wealth & Insurance Consultant

This role is for an "A-Player" who can handle both HNIs and Corporate Treasurers.

The Mission: To act as a strategic advisor for high-net-worth families and institutional clients, bridging the gap between complex financial instruments and long-term organizational/personal goals. You will be responsible for awarding and managing mandates that prioritize capital preservation and structural efficiency.

Key Responsibilities:

- **Institutional Mandates:** Conduct treasury audits for corporate clients to identify "tax leakage" and unoptimized cash flow.
- **Private Wealth Advisory:** Develop bespoke Investment Policy Statements (IPS) for NRI and HNI families.
- **Fiduciary Stewardship:** Actively monitor portfolios against market volatility, ensuring alignment with SEBI/IRDAI regulations.
- **Stakeholder Management:** Present technical data and risk-attribution reports to Company Boards and MDs.

The Ideal Candidate:

- **Experience:** 3–5 years in Private Banking or Institutional Sales, Freshers can also apply.
- **Credentials:** Minimum Graduate, Post Graduates, MBA preferred.
- **The "Boutique" Edge:** You must be comfortable with "Deep Work"—moving beyond product-pushing to become a technical confidant for your clients.
- **Technical Grit:** A basic understanding of Indian Tax Laws (Section 37(1), NRE/NRO repatriation) and Ind AS accounting standards.