EVERGUARD LIFE VENTURES PVT.LTD.

www.everguardlife.com

Everguard Life Ventures Private Ltd. is a Global Investments Management firm, with a vision to be the **most trusted and respected financial services** brand. We are already on target based on our client's feedback. Our clients are **HNIs and UHNIs spread across the globe**, including North America, Europe, the Middle East, and Asia.

We are a **client-obsessed** firm, with a **client retention ratio** of **98%** over the last **10 years** and a **median client asset base** of **1.25 Crores.**

Our Mission is to manage **INR 10,000 Crores by 2035**

An association with Everguard Life Ventures allows you to work with the best minds in the Investments Domain, our CEO is well-known in the industry and has global connections including top investment bankers and CIOs. This position offers **on-the-ground and practical exposure** to the Investments Industry thereby providing you an opportunity to build your **professional acumen**.

Job Description:

We are looking for a **Service Relationship Manager** who is detail-oriented, with high integrity, and has a client-first mindset.

Job Roles and Responsibilities:

1. Help in client onboarding by completing the KYC process, Opening accounts on our platform, Mandate activation for investment readiness for all the products i.e. Mutual Fund, AIF and PMS.
2. Interact with Clients to resolve their operational and service-related queries - Transactions, Mandates, Account Opening.
3. Build relationship by interacting with the Operations teams of AMCs, RTAs to resolve operational incidents related to these external parties.
4. Manage non-financial transaction processes to comply with regulations e.g. Nomination update, KYC update.
5. Manage the Everguard EAM system by keeping the client portfolios and reference data up to date as per the required frequency.
6. Raise client financial transactions like Purchases, redemptions, SWP, SIP.
7. Monitor transactions and ensure they are executed successfully.
8. Schedule client review meetings as per the review schedule in collaboration with the Investment team.
9. Share Client Reports - Portfolio and Taxation.
10. Update CRM with relevant notes from client interactions.

Job Roles and Responsibilities:

11. Schedule calls with clients monthly for feedback on services and overall experience.

12. Schedule marketing/education campaign and execute in collaboration with the investment team.

13. Manage logistics for Monthly Webinars, offline Events, and Campaigns.

14. Prepare MIS reports on a weekly basis for all Service Operational related tasks and Campaigns.

Eligibility Criteria:

1. Minimum 2 years and Maximum 3 years' experience in a client facing role, preferably in Investments and Finance operations
2. Degree - BCom. BBA, MBA
3. Good verbal and written communication skills
4. Very good Relationship management skills
5. Good time management and collaboration skills
6. Working knowledge of MS Excel for Management report preparation
7. Detail oriented
8. Must have – At least 1 year experience in working in Mutual Funds domain.
9. High level of integrity.

Benefits of working at Everguard

1. Excellent learning opportunities
2. Collaborative work environment
3. External company-sponsored training based on **your interests,** post the probation period.

Reporting to: Head of Operations

Location: Pune

Start Date: 15 January, 2025

Probation: 3 months

Schedule: Monday to Friday: 9 AM to 5:30 PM; Saturday: 10 AM to 3 PM.

Remuneration:

Salary: ₹25,000 - ₹30,000 per month

If interested, send your Resume to talent@everguardlife.in