

Job Description:

Client Investment Partner - Investments & Client Success

[Everguard Life Ventures Pvt. Ltd.](#) | Pune (On-site) | 2–3 years' experience |

Joining Date: 6th April, 2026

About Everguard

Everguard Life Ventures is a specialist investment management firm building long-term wealth outcomes with a strong client-first philosophy. We work with Salaried Professionals and **HNI & UHNI families** across **India, North America, Europe, and the Middle East.**

Why people trust us:

- **Client-first intent, always:** we listen to goals first and keep clients informed with a thorough, rigorous service approach and high professional standards.
- **Proven long-term relationships: 98% client retention** over the last decade, built on trust and consistent service.
- **Proactive, transparent communication:** Clients highlight periodic portfolio reviews and being kept in the loop, with timely updates and follow-ups.
- **High-value trust demonstrated by client scale:** A strong average client asset base of **₹1.5 Cr** and a clear long-term ambition of **₹10,000 Cr AUM in a decade.**
- **Credibility + Social proof:** Rated **4.9/5** on google customer reviews

If you enjoy solving real client problems, owning execution end-to-end, and building trust, **this role is for you.**

What You'll Own

As a **Client Investment Partner**, you will own **the end-to-end client experience and outcomes** for retail and pre-retiree clients, covering service, execution, and retention.

You'll ensure every journey (onboarding → transactions → ongoing support) is **smooth, accurate, and fast**, while **strengthening asset momentum** through **proactive follow-ups, timely nudges**, and **strong CRM hygiene**, always aligned with documentation and compliance.

In practice, You'll own:

- **Client experience & closure:** fast resolution, clear next steps, zero loose ends.

- **Asset-building support:** SIP upgrades/top-ups and surplus cash deployment (*as per RM/advisory direction*).
- **Retention engine:** prevent lapses, spot risk early, keep clients engaged and satisfied.

Note: This role has no sales targets and no cold-calling quotas. We want a high-energy owner who moves fast and gets things done without traditional sales pressure.

Key Responsibilities

1) Asset Building & Retention (Client Growth + Stickiness)

- Drive **AUM growth per client** by identifying actionable opportunities: SIP Step-ups, Goal-based gap, STP/SWP structuring support, and deployment of surplus cash.
- Run **proactive retention routines:** renewal nudges, SIP lapse prevention, bounce follow-ups, and portfolio-action reminders to reduce drop-offs.
- Track **client health signals** (service dissatisfaction, delayed follow-ups, repeated issues, low engagement) and intervene early with solutions/escalations.
- Ensure every client interaction ends with a clear next step, improving **repeat transactions, referrals, and long-term trust**.

2) Client Communication & Relationship Support

- Handle inbound/outbound communication via **calls, WhatsApp, email**.
- Understand requirements, set expectations, and **close loops quickly**.
- Coordinate with business development for **lead follow-ups** and campaigns.

3) Onboarding & Transactions (Zero-error mindset)

- Manage onboarding end-to-end: **KYC/CKYC, FATCA/CRS, bank & nominee updates, platform setup**
- Coordinate with Operations and ensure transactions: **SIP, Lumpsum, STP, SWP** (with proper confirmations and cut-offs).
- Ensure clean documentation and accurate processing every time.

4) Issue Resolution & Escalations

- Solve client issues by coordinating across ops/tech/product.
- Track until closure and reduce repeat issues through process suggestions.

5) Review Prep & Follow-ups

- Support periodic reviews: data gathering, notes, action items.
- Ensure follow-ups are completed and client queries are addressed on time.

6) Compliance & Documentation

- Maintain structured CRM records: risk profile, communication logs, confirmations, approvals.
 - Follow ethical communication: **no return guarantees, no misselling, disclose** charges appropriately.
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What We're Looking For

Must-haves

- **2–3 years** in wealth, broking, mutual funds, *client education, servicing and retention*.
- **Strong verbal communication:** calls/meetings are a big part of the role.
- **High ownership**, proactive follow-through, strong attention to detail.
- **Proficient with CRM + Excel/Google Sheets**

Good-to-have

- Basic understanding of investment products and workflows (MF/SIP, onboarding).
 - Experience with handling escalations and maintaining service TATs.
 - NISM Certification Mutual Funds.
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What You'll Get

- **Steep learning curve** across investments, client success and relationship management: past team members consistently share that they felt “*years ahead in a couple of months*” because of the intensity, exposure, and feedback cadence.
- **High-value client exposure (not just back-office work):** You'll be part of real client conversations and servicing for Salaried and HNI families, building confidence and commercial judgment fast.
- **Access to leadership:** Direct visibility and learning from CXOs faster decisions, faster growth, less bureaucracy.
- **Clear growth path into the RM / Client Advisory track:** Strong performers move into higher ownership roles with expanding client responsibility.

- **Performance-linked upside + impact-based ownership:** Your outcomes matter
 - **A non-toxic, supportive team environment:** high standards, but with strong mentorship, practical support, and respectful collaboration.
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Compensation: Incentives, Bonus and Benefits

- **CTC & Pay Structure:** to be discussed (according to market standard)
 - **Benefits & Support (In addition to salary)**
 - a) **Mobile + Internet Reimbursement:** up to ₹1,000/month (As per policy)
 - b) **Work Laptop Provided:** A dedicated laptop will be issued on joining.
 - c) **Paid Leaves:** As per company policy
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How to Apply

- Send your resume to: talent@everguardlife.in
- **Subject line:** *Application – Client Investment Partner (Pune)*
- Include: **Current CTC | Expected CTC | Notice Period**