ENTRUST
FAMILY OFFICE

About Entrust Family Office:

- A Multi Family Office that handles all financial matters of Uber-Wealthy Families/ UHNI Individuals/ Corporates
- One of the earliest firms in India, to be registered under SEBI's new Investment Advisor guidelines
- Specialized in facilitating Investment Advisory, Corporate Finance, Private Equity, Business Advisory, Legal & Taxation etc. Presently expanding its capabilities to fulfil client needs
- Founded in Bengaluru in 2013, by industry professionals with work experience in senior roles in reputed organizations such as Kotak Mahindra Bank, HDFC Bank and IL&FS Investment Managers
- Backed by a team of senior professionals with significant domain expertise in financial services
- Entrust Family Office has built a strong reputation of a client centric firm with high integrity at a young age

Job Opening:

- **Acquire & Manage Clients &** : In the Advisory and Distribution model.
  - Advisory Model: Ultra High Net-Worth Individuals (UHNI) are defined as clients with investible surpluses above ₹10 Crores.
  - Distribution Model: UHNI clients are defined as those with investible surpluses above ₹2 Crores.
- **Profile:** AVP/ VP /SVP- Client Partner
- **Location:** Bangalore / Chennai /Mumbai / Hyderabad / Coimbatore
- **Remuneration Model:** Fixed + Variable: Salary will be a combination of Fixed pay + high performance based variable pay

Job Description:

We are looking for a few wise professionals. Those who align with the statements below:

- You want to serve clients wholeheartedly keeping the clients interest as the top priority.
- You aspire to become a visionary financial professional and know that it can happen only in a boutique firm that will groom you and give you wings.
- You want to feel the pride that comes from serving luminous clients.
- You want to belong in a firm that calmly navigates through volatile market cycles.

Job Responsibilities:

UHNI Market Research and Analysis:

- Conduct comprehensive market research to identify potential Ultra High Net-Worth Individuals (UHNI) and understand market trends within the high-net-worth segment.
- Analyze the financial landscape to pinpoint unique opportunities for serving UHNI clients effectively.

UHNI Client Acquisition:

- Target and acquire UHNI clients with financial assets exceeding ₹8 Crores (approx. $1 Million).
- Develop and implement targeted acquisition strategies to attract UHNI clients.
- Build and nurture relationships with UHNI clients through strategic networking and outreach efforts.

Tailored Solutions for UHNIs:

- Collaborate with internal teams to create customized financial solutions that address the specific needs and goals of UHNI clients.
- Present and articulate complex financial strategies to UHNI clients with clarity and sophistication.

Sales and Revenue Generation for UHNIs:

- Achieve and exceed sales targets for UHNI client acquisition and revenue generation.
- Work closely with the sales team to effectively position and promote our exclusive offerings to UHNI clients.

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UHNI Client Relationship Management:

- Manage and enhance relationships with existing UHNI clients to ensure satisfaction and identify opportunities for deeper engagement.
- Provide a high-touch, white-glove level of service to enhance the overall UHNI client experience.

Cross-functional Collaboration:

- Collaborate with marketing, product development, and other teams to align UHNI business development strategies with overall company objectives.
- Ensure cohesive execution of UHNI acquisition and client servicing strategies.

Reporting and Analysis for UHNIs:

- Prepare detailed reports on UHNI business development activities, including successes and challenges.
- Conduct regular analysis of UHNI sales data to identify areas for improvement and optimize performance.

Wealth Management Services:

- Address the complex financial requirements of UHNI families, including investment advisory, transaction execution support, banking support, and annual tax filing.
- Oversee all aspects of multi-family office engagement, ensuring seamless onboarding, communication with third-party advisors, and coordination with client auditors.

Client Review and Value-Added Services:

- Coordinate and conduct timely client review meetings.
- Introduce and promote other value-added service offerings from Entrust to clients.

Financial Reporting and Modeling:

- Manage financial reporting packages and modeling for multi-family engagements, including net worth statements, asset reviews, cash flow reports, forecasting, income statements, tax summaries, and budget management.

Third-Party Advisor Management:

- Maintain relationships with third-party advisors, including legal, accounting, banking, and finance partners.
- Ensure effective collaboration and service delivery across all advisor relationships.

Process Improvement and Confidentiality:

- Continuously review and improve best practices for family office services, finance, and accounting operations.
- Always ensure strict confidentiality and security of client information.

Personality Traits Required for Success:

- Experience working directly with high-net-worth individuals is a plus
- Critical and strategic thinker who thrives in a quick pace, ever changing, complex environment.
- Financial and accounting statement experience with the ability to think outside standard reporting processes.
- Detail oriented, but able to understand the families' needs and the greater financial picture.
- Presents with professionalism, strong communication, writing and listening skills.
- Thoughtful leader regarding internal controls and protocol safety of personal data and information.
- Team player with a high EQ willing to "roll up their sleeves to do what it takes".
- Approachable, trustworthy, and dependable individual and leader, with exceptional interpersonal and team development skills.
- Knowledge of trusts and estate organization and planning a plus
- Entrust focuses on client centric alignment and hence requires highest level of integrity
- Our business model incorporates the **"Wise Wealth"** philosophy, and we strive to serve such clients. In doing so we have become custodians of Wise Wealth, and our endeavor is to ensure that all employees imbibe and practice this philosophy.

Qualification:

- MBA & relevant professional qualification
- Preference for candidates with experience in Relationship Banking, Wealth Management with an existing set of Ultra High Net-worth clients, UHNI definition being above 10 Cr (Advisory Model) / 2 Cr (Distribution Model) Investible surpluses
- 15 years of work experience

Growth Potential:

- Advantage of being an early mover in an emerging segment of Family Office/ Investment Advisory.
- Opportunity to be a part of growth of a young company as it grows in size and stature
- Significant learning potential with the firm expanding in capabilities
- Self-initiative to be rewarded well
- Opportunity to develop a client roster of some of the richest Indians
- Entrust follows a 'Deliver & Grow' policy for all employees. Immense potential for an individual to gain experience, perform well and take on larger responsibilities within the firm. In addition to enhancing financial domain expertise, one will get to learn other critical value-added service like Estate Planning, Property Management, CFO, Legal service etc. This will help in developing the candidate into a true Family Office Advisor managing a holistic family office mandate
- 'Growth from within' policy shall favor early employees with proven delivery track record
- Financial services are one of the best paying segments and over time, as the individual displays consistent performance, emoluments will commensurately grow

Work Environment:

- Entrust provides an opportunity to utilize and upgrade/acquire skills
- Significant training and mentoring on the job
- A friendly and interactive atmosphere which ensures immense learning opportunity
- Lean structure