Job Title: Asst. Manager/ Manager/ Senior Manager – Client Servicing, Reporting & Operations (CSRO)

Company: Upwisery

Location: Madhapur, Hyderabad

Employment Type: Full-time, Onsite

About Upwisery:

Founded in 2014, Upwisery is a premier multi-disciplinary advisory and financial services firm specializing in Investment Banking, Private Wealth, M&A Tax & Regulatory, and Corporate Insurance. We provide tailored solutions to mid-market enterprises, family offices, and Ultra High Net-Worth Individuals (UHNIs), successfully facilitating transactions exceeding USD 1 billion across various sectors. Upwisery has been recognized among the top 10 Private Equity & M&A deal advisors in the India League Tables for CY'22 and CY'23, highlighting our commitment to excellence and innovation.

As part of our Private Wealth & Family Office division, we serve a wide array of families, HNIs, and UHNIs both in India and internationally, offering advisory, distribution, estate and succession planning, as well as portfolio reporting and analytics.

Upwisery has also been certified as a 'Great Place to Work' in 2024, 2025 & 2026 acknowledging our purpose-driven culture centered around entrepreneurial spirit, collaboration, and collective growth. With offices in Hyderabad, Mumbai, Bengaluru, Chennai, and Coimbatore, we are expanding and looking for a dynamic professional to join our team.

Position Overview:

We are seeking an experienced and detail-oriented professional to join our Private Wealth & Family Office team as Manager or Assistant Manager – Client Servicing. This role will include managing clients, handling their queries, preparing their portfolio reports, managing the processes through CRM tool. The ideal candidate will possess experience in client servicing, exceptional problem-solving skills, and the ability to deliver a seamless client experience through strategic engagement and superior service delivery.

Key Responsibilities:

- Serve as the primary point of contact for assigned clients, addressing their inquiries, concerns, and requirements with efficiency and professionalism.
- Ensure prompt acknowledgment and resolution of client queries, either directly or by collaborating with internal teams and partners.
- Maintain accurate and up-to-date client records through CRM systems, ensuring seamless tracking and follow-ups.
- Prepare and provide clients with insights and updates on their investment portfolios.
- Oversee daily investment operations ensuring timely and accurate execution.
- Perform regular reconciliation of client accounts and investment transactions
- Ensure adherence to internal policies, SOPs, and regulatory requirements
- Establish and monitor operational processes, controls, and service standards
- Prepare reports and documents for client meetings and follow-up discussions.

- Foster strong client relationships by proactively engaging with clients, understanding their evolving needs, and providing customized solutions.
- Identify opportunities for upselling and cross-selling relevant financial products and services, contributing to revenue growth.
- Enhance client retention strategies by continuously evaluating and improving the overall client servicing approach.
- Develop and implement best practices to streamline client servicing operations, ensuring optimal client satisfaction and efficiency.
- Work closely with internal stakeholders, including investment advisors, relationship managers, and operations teams, to deliver a cohesive and high-quality client experience.
- Prepare and present client reports, updates, and insights to management for strategic decision-making.
- Stay updated with industry trends, regulatory changes, and market developments to provide informed recommendations and insights to clients.

Qualifications & Requirements:

1. Experience: 4-8 years of experience in client servicing, preferably within the financial services sector.
2. Education: MBA or an equivalent degree is preferred.
3. Industry Expertise: Prior experience in Mutual Funds, Wealth Management, and Family Office services is highly desirable.
4. Communication Skills: Exceptional verbal and written communication skills, with the ability to articulate complex financial concepts effectively.
5. Problem-Solving: Strong analytical and critical thinking skills to proactively address client concerns and provide effective solutions.
6. Technical Proficiency: Proficiency in MS Office and CRM tools, with a solid understanding of financial products and services.
7. Software Proficiency: Familiarity with platforms such as Asset Vantage, Mprofit, Investwell, Morningstar, MF Utility, and BSE Star is a plus. Knowledge of Excel, Python, or other database tools is also advantageous.
8. Client-Centric Approach: A high degree of empathy, patience, and a results-driven mindset to ensure superior client engagement and satisfaction.
9. Operational Excellence: Good understanding of wealth management and financial products, Knowledge of KYC, AML, Transaction execution and client onboarding processes.
10. Attention to Detail: Excellent organizational skills, with the ability to manage multiple client interactions simultaneously while maintaining accuracy and compliance.
11. Strategic Thinking: Ability to identify growth opportunities, enhance service models, and contribute to business development initiatives.
12. Availability: While not mandatory, immediate availability is preferred as we are looking to fill this role urgently.

Application Process:

If you are a proactive, detail-oriented professional seeking to be part of a dynamic and growing organization, we invite you to apply for this exciting opportunity.

Qualified candidates are encouraged to submit their resume and cover letter to anushka@upwisery.com, with the subject line: Application for Manager/Assistant Manager – Client Servicing.