Endovia Family Office

JD Wealth Management – Sales Associate

This position will be directly responsible for achieving assigned sales targets and contributing to the overall growth of the business through proactive client acquisition and deepening of existing relationships. The ideal candidate will possess excellent communication skills, a strong understanding of stock markets and investment products, and a proven track record in sales or relationship management roles. Experience in book building of products and a results-driven approach are essential.

Key Responsibilities

- Build and maintain long-term relationships with HNI clients, delivering exceptional service and tailored investment solutions.
- Engage with clients to understand their financial goals, risk appetite, and investment preferences.
- Present and explain stock market products, investment opportunities, and portfolio performance in a clear and professional manner.
- Participate in the book building process for new products, coordinating with internal teams and clients to ensure successful product launches.
- Achieve and exceed sales targets through proactive client engagement and effective pipeline management.
- Monitor market trends, economic news, and portfolio performance to provide timely and relevant advice to clients.
- Prepare and deliver presentations, investment proposals, and periodic performance reports for clients.
- Ensure all client interactions and transactions comply with regulatory and internal compliance standards.
- Collaborate with product, research, and operations teams to address client needs and resolve issues efficiently.
- Maintain accurate records of client communications, transactions, and feedback.

Key Requirements

- Minimum 3 years of experience in a sales, relationship management, or client advisory role within financial services, wealth management, or stock broking.
- Excellent verbal and written communication skills, with the ability to engage and influence HNI clients.
- Basic to intermediate understanding of stock markets, investment products, and portfolio management.
- Demonstrated experience in book building and product launches within financial services.
- Proven goal orientation with a track record of meeting or exceeding sales targets.
- Strong interpersonal skills, professionalism, and a client-centric mindset.

- Ability to work independently and as part of a team in a fast-paced, performance-driven environment.

Desirable Attributes

- Certifications such as NISM, CFA Level 1, or equivalent are an advantage.
- Experience handling confidential client information with discretion.
- Analytical mindset and problem-solving skills.