

Job Title: Senior Operations Executive – Wealth Management

Company: Endovia Wealth

Location: Vidyavihar West, Krol Road, Mumbai

Salary: ₹25,000 – ₹30,000 per month

Experience Required: 2–3 years

Industry: Wealth Management / Financial Services

Working Days: Monday to Friday

Working Hours: 9:00 AM – 6:00 PM

Job Summary

We are seeking a Senior Operations Executive with prior experience in wealth management or financial services. The role involves managing daily operational activities, supporting client servicing, and coordinating with internal and external stakeholders to ensure smooth execution of investment transactions.

Key Responsibilities

- Handling operations for Mutual Funds, PMS, AIF, and other investment products
- Processing client transactions, forms, and documentation
- Coordinating with AMCs and RTA platforms (CAMS/KFintech)
- Maintaining accurate client records and portfolio data
- Supporting Relationship Managers with transaction execution and reporting
- Preparing MIS and operational reports
- Ensuring documentation accuracy and process compliance
- Addressing client queries related to transactions and statements

Required Skills

- Knowledge of wealth management products (MF, SIP, Redemption, Switch, etc.)
- Familiarity with CAMS, KFintech, and financial platforms
- Understanding of financial documentation and operations workflow
- Strong coordination and follow-up skills
- Proficiency in MS Excel and MS Office
- Good attention to detail

Eligibility Criteria

- Graduate (Commerce/Finance preferred)
- 2–3 years of experience in wealth management or financial operations
- Candidates with experience at Motilal Oswal or similar wealth management firms will be preferred
- Women candidates are encouraged to apply

Other Requirements

- Good communication skills
- Ability to work in a fast-paced environment
- Immediate joiners preferred