ENTRUST
FAMILY OFFICE

About Entrust Family Office

Entrust Family Office is a leading Multi-Family Office committed to serving ultra-high-net-worth individuals (UHNI) and uber-wealthy families with a comprehensive range of financial and non-financial services, tailored to their unique needs.

Our Core Specializations:

- **Investment Management:** Customized strategies to ensure sustainable wealth growth and preservation.
- **Public & Private Equity:** Expertise in structuring investments and strategic advisory.
- **Business Advisory:** Providing actionable insights to support impactful decision-making.

Additional Support Services:

- **Shared CFO Services (Corporate & Family):** Strategic financial leadership for effective wealth stewardship.
- **Estate & Succession Planning:** Ensuring seamless transitions and robust legacy planning.
- **Legal & Taxation Advisory:** Comprehensive guidance to address complex requirements.
- **Real Estate & Property Management:** Managing and optimizing real estate portfolios.
- **Lifestyle Services:** Personalized services designed to complement and enhance client lifestyles.

Entrust Family Office has been honored with several prestigious accolades this year, including **Family Office of the Year** at the AISL Edition II Summit 2024 and the **Family Office Excellence Awards 2024**. We were also featured among the **Top 10 Investment Advisors in India 2024** by *Finance Outlook India Magazine* and recognized as the **Family Office of the Year** for **Pioneering Innovative Family Office Solutions** by India Sotheby's International Realty, CNBC TV18, and Grant Thornton Bharat.

Founded in Bengaluru in 2013 by seasoned industry professionals with deep expertise in financial services, Entrust Family Office has established itself as a trusted, client-centric firm, distinguished by its integrity, excellence, and unwavering commitment to delivering value.

Job Opening: VP / SVP – Investment Advisory

We are seeking a candidate with 12+ years of experience in Investment Advisory. The ideal candidate should have strong knowledge of financial products, be an independent thinker, and possess the ability to build consensus both internally and externally. Collaboration and teamwork are essential, and these skills are non-negotiable. The candidate should also have experience engaging with prospects and clients, confidently presenting investment opportunities, and portfolio actions based on well-reasoned recommendations that are always in the client's best interest. Strong communication skills are necessary to gauge the audience's needs and tailor the message accordingly.

The Investment Advisor will also provide support for Business Development, creating relevant materials for prospect and client meetings, tailored to specific audience, supporting sales efforts towards closure.

Personality Traits & Qualification

- **Personality Skills:** Independent Thinker, Energetic, Positive Attitude, Flexible, Goal oriented, Assertive, Go-getter attitude, Self- driven and ability to network. Entrust Family Office focuses on client centric alignment and hence requires highest level of integrity.
- **Behavioral Skills:** Teamwork, Collaborative, Good Communicator, Taking Initiative, Problem Solving, Analytical and Attention to detail. Ability to understand and grasp various facets of financial services and Lifestyle requirements of UHNI clients.

- **Presentation skills:** Knowledge of principles and methods for showing, promoting, and explaining investment advisory services.
- **Domain skills:** Specific knowledge of Capital Markets domain (including equities, alternatives, fixed income, PMS, mutual funds) overall financial markets domain, as well as knowledge of global markets & trends in general. Strong analytical and product research skills, Risk assessment.
- **Educational & Proficiency level:** Postgraduate / MBA with 10 to 15 years of domain experience, ideally in a capital markets / Investments, Relevant NISM Certificate and CFA (Completed / Pursuing) is an added advantage.
- **Languages:** Required to be fluent in English, good written and verbal communication skills.

Key Responsibilities

- Provide Analytical support towards asset allocation calls made by the Investment Advisory Team and tactical allocation calls.
- Ability to independently identify, analyze, put forth investment ideas, recommendations backed by high quality research.
- Fully proficient and knowledgeable as an expert in the tools, systems, and procedures required to accomplish the job. Provide investment related technical input to support BD efforts and post conversion client servicing.
- Document and maintain up-to-date investment ideas & recommendations including a list of which clients has been recommended what idea and when, with outcomes.
- Participate in customer calls and events as necessary to promote ENTRUST services through presentations of Investment Advisory Services.
- Ongoing portfolio monitoring & reviews

Growth Potential

- Advantage of being an early mover in an emerging segment of Family Office in India
- Opportunity to be a part of growth of a young company.
- Significant learning potential with the firm expanding in capabilities.
- Self-initiative will be rewarded well.
- Opportunity to develop a client roster of some of the richest Indians.
- Entrust Family Office 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.
- '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

- Advantage of being an early mover in an emerging segment of Family Office/ Investment Advisory.
- Backed by a robust process and strong back-end infrastructure.
- Significant training and mentoring on the job.
- A friendly and interactive atmosphere which ensures immense learning opportunity.
- Entrust follows a 'Deliver and Grow' mantra for employees, so high performers shall be rewarded well. Variable salary linked to performance could be suitably worked out
- Lean & Flat hierarchical structure

Location

- Bangalore

Remuneration Model

- Fixed + Variable: Salary will be a combination of Fixed pay + high performance-based variable pay.

Note

This job description is intended to provide an overview of the role and its responsibilities. Specific duties and qualifications will be subject to change based on the needs of the Multi Family Office and UHNW client requirements.