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.

Position Overview: Senior Vice President – Equity Sales

The **Senior Vice President – Equity Sales** will lead client-facing equity advisory and execution services. The ideal candidate will have 15+ years of experience in equity dealing from reputed brokerage houses / research firms, deep knowledge of stock fundamentals, strong client engagement capabilities, and a proven track record in advising, executing and managing non-discretionary portfolios for HNIs/UHNIs.

Job Title: **Senior Vice President – Equity Sales**

Location: Major Financial Centre (e.g., Mumbai / Bengaluru) or as per business needs.

Key Responsibilities

Client Advisory and Sales

- Engage with clients on individual stock ideas based on in-depth research, market trends, and valuation.
- Present and communicate convincing investment rationales for buy/sell decisions.
- Build, nurture and expand long-term client relationships across HNI/UHNI, family offices and institutions.
- Provide timely and proactive market intelligence to clients on equity markets, corporate actions, and sector developments.

Portfolio Monitoring & Reporting

- Oversee non-discretionary equity portfolios and ensure alignment with client objectives and risk profiles.
- Track portfolio performance, market movements, corporate actions and rebalance when required.
- Create and deliver client-ready reports on holdings, transaction summaries, performance and recommendations.

Research & Market Knowledge

- Stay updated on company fundamentals, sector trends, economic indicators and market events.
- Collaborate closely with research teams to develop proprietary insights.
- Conduct periodic reviews and thematic presentations for clients.

Compliance & Risk Management

- Ensure regulatory, operational and compliance policies are strictly followed.
- Maintain accurate records of client orders, communications, and documentation.
- Monitor risk exposures, concentration limits, and regulatory requirements.

Key Qualification & Experience

- 15+ years of experience in equity dealing desk / brokerage / research environment.
- Strong knowledge of market microstructure, trading, order routing and equity instruments.
- Proven track record of client interaction and equity advisory.
- Deep understanding of company balance sheets, P&L, valuation metrics and sector dynamics.
- Experience in non-discretionary equity portfolio management with responsibility for execution and advice.

Skills & Competencies

- Exceptional communication and presentation skills.
- Ability to convince clients on stock ideas backed by fundamentals.
- High market awareness, quick decision-making and emotional stability during volatility.
- Strong networking and relationship management ability.
- Meticulous attention to compliance, documentation and reporting.
- Ethical, trustworthy and client-first mindset.

Educational Qualification

- Graduate / Postgraduate in Finance, Economics, Commerce or equivalent.
- Additional certifications such as NISM, CFA, FRM are a plus.

Compensation

- Competitive salary and performance-linked incentives.
- ESOP / profit share options may be considered for senior candidates.

Why Entrust?

- Opportunity to work with a high-integrity, fast-growing investment advisory platform serving sophisticated clients.
- Significant autonomy to build client relationships, grow assets and deliver advisory value.
- A culture of research, ethics, transparency, and performance.