CFA Society Pakistan

Senior Officer Wealth Management
Elahi Group of Companies · Karāchi, Sindh, Pakistan (On-site)

Department: Finance
Location: Karachi
Employment Type: Full-time
Responsibilities:

- Develop and manage relationships with high-net-worth individuals (HNWIs) and affluent clients.
- Understand clients' financial goals, risk appetite, and investment preferences to offer tailored wealth management solutions.
- Provide advisory on a range of products, including mutual funds, bonds, insurance, portfolio management services, and structured products.
- Conduct regular portfolio reviews and rebalancing strategies to ensure optimal returns and alignment with client objectives.
- Meet assigned sales and revenue targets by identifying new business opportunities and cross-selling wealth products.
- Keep abreast of market trends, economic updates, and investment strategies to offer informed advice.
- Coordinate with internal teams (e.g., operations, legal, compliance) to ensure seamless service delivery.
- Maintain a deep understanding of the wealth management market in Karachi and Pakistan, including key players, trends, regulatory developments, and competitive landscape.
- Provide expert advice on PIBs, fixed-income securities, equities, mutual funds, ETFs, and alternative investments.
- Monitor market trends, economic indicators, and regulatory changes affecting investments.
- Stay updated on emerging investment trends, including digital assets, green bonds, and Shariah compliant instruments.

Requirement:

- Bachelor’s degree in Finance, Business, Economics, or a related field (Master’s or professional certifications such as CFA, CFP preferred).
- 3–5+ years of experience in wealth management, private banking, or financial advisory roles.
- Strong understanding of financial instruments, investment products, and portfolio management.
- Proven track record in relationship management and achieving sales/revenue targets.

To apply: https://www.linkedin.com/jobs/view/4230805349