



PR/097293 | HNW Case Manager - Insurance / Wealth Planning

Job Information

Recruiter

JAC Recruitment Singapore

Job ID

1599723

Industry

Bank, Trust Bank

Job Type

Permanent Full-time

Location

Singapore

Salary

Negotiable, based on experience

Refreshed

June 26th, 2026 11:51

General Requirements

Minimum Experience Level

Over 3 years

Career Level

Mid Career

Minimum English Level

Native

Minimum Japanese Level

None

Minimum Education Level

Associate Degree/Diploma

Visa Status

No permission to work in Japan required

Job Description

???? Case Manager (Wealth Advisory / Insurance)

???? Singapore

???? About the Role

An established international wealth advisory firm is seeking a Case Manager to support its consultants in delivering bespoke wealth planning and insurance-based solutions for high-net-worth (HNW) clients.

This is an excellent opportunity to gain exposure to complex, cross-border cases and work closely with experienced advisors and global partners.

???? Key Responsibilities

- Manage the end-to-end lifecycle of client cases, from onboarding through to policy issuance
- Support consultants in preparing client proposals and documentation

- Coordinate with insurance providers and external partners to facilitate case execution
- Ensure timely submission and follow-up of applications, underwriting requirements, and policy processing
- Maintain accurate records and manage case tracking across multiple stakeholders
- Ensure compliance with internal policies and regulatory requirements

???? Requirements

- 2–5 years of experience in:
 - Insurance operations / case management
 - Wealth management or financial advisory support
- Strong understanding of life insurance processes and documentation
- High attention to detail and strong organisational skills
- Ability to manage multiple cases and deadlines in a fast-paced environment
- Strong communication and coordination skills

Preferred:

- Exposure to high-net-worth (HNW) clients
- Experience handling cross-border or complex cases
- Familiarity with wealth planning or estate structuring concepts

???? What's on Offer

- Exposure to high-value, sophisticated client cases
- Opportunity to work in a specialised and growing segment of wealth advisory
- Collaborative, international working environment
- Competitive remuneration and career progression opportunities

???? Apply

If you are interested in exploring this opportunity, please submit your CV for a confidential discussion.

#LI-JACSG
#countrysingapore

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Company Description