

PR/097862 | HNW Case Manager

Job Information

Recruiter
JAC Recruitment Singapore

Job ID
1621678

Industry
Bank, Trust Bank

Job Type
Permanent Full-time

Location
Singapore

Salary
Negotiable, based on experience

Refreshed
November 10th, 2026 10:38

General Requirements

Minimum Experience Level
Over 3 years

Career Level
Mid Career

Minimum English Level
Native Level

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