

PR/097875 | Assistant Manager / Manager - Middle Office (Client Services) - HNW Insurance Broker

Job Information

Recruiter
JAC Recruitment Singapore

Job ID
1621683

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

Location: Singapore

About the Opportunity

Our client is a well-established wealth advisory and financial services firm seeking an experienced Assistant Manager / Manager, Middle Office to support business development, client servicing, and operational activities. This role is ideal for a highly organised professional who enjoys working in a client-facing environment while ensuring smooth execution of onboarding, documentation, and stakeholder coordination processes.

Key Responsibilities

Presentation & Business Support

- Prepare professional presentation materials for client meetings, business reviews, and stakeholder engagements.
- Develop clear and visually impactful comparisons, illustrations, and financial projections to support client discussions.
- Assist advisers and management with ad hoc reporting and business presentations.

Client Onboarding & Administration

- Coordinate client onboarding activities and ensure all required documentation is completed accurately and promptly.
- Arrange medical examinations and other requirements associated with insurance and financial product applications.
- Monitor application progress and coordinate with internal teams and external service providers to ensure timely completion.

Client & Partner Relationship Support

- Liaise with clients, business partners, and referral sources to obtain information and documentation.
- Manage follow-ups and maintain effective communication throughout the onboarding and servicing process.
- Ensure a high standard of client experience and responsiveness.

Business Development Support

- Support lead management and prospecting initiatives.
- Assist with meeting scheduling, pipeline tracking, and follow-up activities.
- Maintain accurate records of client and business development activities.

Meeting Coordination

- Organise and coordinate meetings with clients, partners, and stakeholders.
- Prepare meeting materials and ensure timely follow-up on agreed action items.
- Facilitate smooth communication between all parties involved.

Requirements

- Diploma or Degree in Business, Finance, Banking, Marketing, or a related discipline.
- Minimum 3 years of experience in middle office, client servicing, sales support, business support, insurance operations, or a related function.
- Prior exposure to insurance, wealth management, private banking, financial advisory, or financial services environments is highly advantageous.
- Strong organisational skills with the ability to manage multiple priorities in a fast-paced environment.
- Excellent interpersonal and communication skills.
- High attention to detail and strong administrative capabilities.
- Proficient in Microsoft Office applications, particularly PowerPoint and Excel.
- Professional, proactive, and able to handle confidential information with discretion.

Mandatory Requirement

Holder of a valid RNF (Representative Notification Framework) licence registered with MAS.

What's on Offer

- Opportunity to join a reputable financial services organisation.

- Exposure to high-net-worth client servicing and wealth advisory operations.
- Collaborative and professional working environment.
- Competitive remuneration and career progression opportunities.

#LI-JACSG
#countrysingapore

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Company Description