



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

募集職種

人材紹介会社

ジェイ エイ シー リクルートメント シンガポール

求人ID

1599723

業種

銀行・信託銀行・信用金庫

雇用形態

正社員

勤務地

シンガポール

給与

経験考慮の上、応相談

更新日

2026年08月21日 04:00

応募必要条件

職務経験

3年以上

キャリアレベル

中途経験者レベル

英語レベル

ネイティブ

日本語レベル

無し

最終学歴

短大卒：準学士号

現在のビザ

日本での就労許可は必要ありません

募集要項

???? 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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会社説明