

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

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
1621683

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11月10日 10:38

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
ネイティブレベル

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

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

Notice: By submitting an application for this position, you acknowledge and consent to the disclosure of your personal information to the Privacy Policy and Terms and Conditions, for the purpose of recruitment and candidate evaluation.

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会社説明