

Associate, Client Services & Onboarding

Description

Privé Technologies is one of the first and fastest-growing FinTech companies based in Hong Kong, with multiple offices in Asia and Europe. The core offering is an innovative wealth management platform, which is seen by many as a disruptive force in the industry.

The current clients include financial institutions like External Asset Managers, Family Offices, and Private Banks in Europe and Asia. Privé has been recognized in the Top 50 Financial IT Pathfinder 2016/2017 Global Rankings. Privé was also most recently a FinTech winner in the 2017 Hong Kong ICT Awards and was selected as the winner of consecutive Asian Private Banker Technology Awards in 2015 and 2016. Privé also went on to be awarded as a finalist in the Accenture Program.

The Client Services & Onboarding team plays a vital role in forging enduring relationships with Privé's customers by providing a seamless onboarding experience and reliable client support to them. It is a small, close-knit, and dynamic team rooted in an agile and hard-working mindset.

Responsibilities

- Work closely with the Project Manager and Client to gather client onboarding requirements
- Timely and accurate set-up of Client / Prospect / Demo applications according to required specifications
- Ensure user accounts are created and managed in accordance with Privé's user access security guidelines
- Provide onsite/offsite client support as part of the client onboarding process
- Perform first-line client support response to calls/emails and ensure prompt resolution of these requests
- Ensure client communication is appropriately managed
- Escalate issues in accordance with the client escalation framework
- Review control reports to ensure all client support tickets have been followed-up according to service level guidelines
- Work closely with Sales and Developers to document business and functional requirements for client-driven technical change requests relating to user account management
- Support the regional CSO manager in creating service desk reports for both internal and external stakeholders
- Assist the Head of Client Services & Onboarding in improving efficiency, control, and user experience of the user account management and platform configuration capabilities through infrastructural upgrades and implementation of standard operating procedures.
- Assist the Head of Client Services & Onboarding in Improving the client service framework
- Should be able to work or be on standby on Saturdays and Public Holidays on an as-needed basis

Hiring organization

Privé Technologies

Privé Technologies is a leading Software as a Service (SaaS) provider, helping financial institutions to digitize their wealth management offerings using modular platform.

The breadth of Privé Technologies's suite of products – which spans from client acquisition and content marketing, to digital onboarding and CRM, to portfolio construction, portfolio management (PMS), portfolio monitoring and reporting, to account aggregation, and more – is unparalleled in the financial technology industry.

Privé Technologies's lego block approach allows clients to choose and assemble unique journeys from their wide range of modules and digital solutions to suit their individual needs, empowering them with the tools necessary to achieve any digital goal, be it creating fully digital Advisor-led wealth management journeys to end-to-end robo-advisory solutions. This modularity and flexibility allows Privé Technologies to solve a wide variety of use cases across the wealth management landscape through their scalable, cloud based platform, and helps clients to expedite their digitisation efforts. It also allows Privé Technologies to service a range of different wealth segments from HNWI to mass retail. Privé Technologies's tools currently live with Private Banks, Retail Banks, Insurers, Asset Managers, Securities & Brokerage providers as well as Multi-family offices and External Asset Managers.

Over the past 10 years, Privé was

Qualifications

- Bachelor's degree in Finance, Business, Computer Science, or a related field
- At least 3 years of relevant experience with a good understanding of Finance and/or Wealth Management
- Must be fluent in English and has the ability to communicate with the global team, and internal stakeholders
- Fluency in Mandarin (Traditional Chinese), German, Thai or Korean is an advantage
- Working experience in a technology (SaaS\Cloud) environment is preferred
- Great attention to detail and ability to work with large data sets
- Proficient in Microsoft Excel or other data analysis tools
- Problem solver with strong analytical skills
- Experience in management reporting and/or root cause analysis
- Certification in Six Sigma, Lean, Agile or having an equivalent experience managing operational process improvement projects is preferred
- Highly organized, ability to multitask, and have excellent time management skills
- A self-motivated individual, able to deliver with minimal supervision, whilst working effectively in a team

ranked 26th fastest growing company across APAC by the Financial Times (2020) — but also through multiple industry awards across all of their product sets.

Founded in 2011, Privé Technologies has offices in 8 different countries servicing clients in over 16 jurisdictions around the globe. Privé Technologies's HQ is in Hong Kong, with offices in Singapore, Malaysia, Thailand, Taiwan, Korea, Austria and Germany.

Privé Technologies is currently service more than 60 financial institutions — across Asia and Europe — with over USD 50 billion supported through their System.

Employment Type

Full-time

Job Location

Hong Kong, Hong Kong SAR
Remote work possible

Date posted

January 17, 2023

APPLY