About the Company

4thoughtsfinance is a Wealth Management firm that has pioneered the cause of unbiased wealth management and family office offering Since 2015.Working closely with generation next leaders, the firm has niche set of offerings which are tailor made to suit its client needs and requirements. Presently managing net worth of USD 250 million across India and Singapore.

The firm's activities are focussed on providing wealth management, advisory on cross border structures and transactions, advisory on business structuring, sourcing and converting domestic as well as cross border Investment banking deals.

Organizational structure : Organized as independent partnership, the firm operates only in best interest of its clients independently. Presently it is shared by 3 whole time and 2 Independent Partners and 15 Advisors and Senior Advisors across divisions of wealth, structure, and compliance.

Client Profile : Firm has built its network by word of mouth and works in network of leading Indian business houses, new generation entrepreneurs, CEO and CXO level Individuals.

Open Position – Lead, Investment Advisory and Product Curation

Present Role can be classified between two closely related tasks of setting up of Investment Advisory division of the firm and parallelly leading the wealth product curation and maintenance.

The key aspects of role are:

1. Leading the Investment Advisory set up for the firm by taking all necessary regulatory approvals and recruiting the related team to set this business.
2. Setting up of Investment and Compliance processes which are prevailing in the industry and ensuring smooth functioning of same in the investment advisory firm
3. Following and improving the wealth (listed and unlisted) product creation, curation and review for the firm. The role involves identifying and onboarding wealth products from existing and new product tie ups, presenting the product features, risk reward and portfolio suitability to the Investment committee, reviewing the existing product portfolio (like conducting regular India based mutual fund ranking , ETF ranking Globally, PMS ranking, quarterly updating AIF's and Start-up Investments in portfolio by speaking with them and taking updates and more)
4. The role will involve regular trip and interaction with Global fund managers and analysis of existing global funds
5. Responsible for maintaining and upgrading (if needed) various investment analysis software's like Bloomberg, Morning star.
6. Taking lead and doing quarterly portfolio reviews across client portfolios in coordination with CIO and Relationship team
7. Basis the need identified in the reviews identifying matching Investment products on regular basis
8. Adding and maintaining firms relationship across various product partners by ensuring regular meetings and reviews.

Candidate Skills and Qualification

1. Must - A professional qualification or a PG or PGDM (Min 2 years) in Finance, accountancy, business mgt, commerce, economics, capital markets, banking, insurance from a university recognized by any state or central government or a CFA charter from the CFA institute
2. An experience of at least 5 years in activities relating to advice in financial products or securities or fund or asset or portfolio management
3. Good to have clearance of NISM-Series-X-A: Investment Adviser (Level 1) & NISM-Series-X-B: Investment Adviser (Level 2)
4. Networking Skills – Connected in the Indian wealth Industry and is keen to keep regular updates on industry on dynamic basis
5. Analytical Skills – Capability to comprehend and present business ideas and proposals in explainable excel models, ability to understand the nuances of existing proprietary product analysis tools and parameters and use it to get desirable review outputs on products.
6. Leadership Skills- Ability to recruit and motivate existing team buy providing conducive learning environment
7. High learnability and self-driven – 4thoughts has a lean team and at this role the person has to involve in high learnability of ever changing industry scenario and be self-driver.

Career Path – Joining as lead for Investment advisory the role can enhance into a global wealth setup and product lead post completion of 2 years as company is excepted to get the existing non liquid NW of client to be converted in Liquid NW to tune of USD 500 million outside India. If candidate has inclination to move outside then this role can lead to leading global wealth advisory setup .