



## We are hiring– Wealth Management (Advisory)

### About Guardian

- Guardian Capital has been awarded “The best investment advisory firm across India” by CNBCTV18
- We are an Elite Wealth and Asset Management firm that offers a wide variety of services ranging from Wealth Management to Financial Planning to Taxation services, all under one roof—all customizable to fit the client’s individual needs.

#### 1. Why work at Guardian? (5 reasons)

2. We believe our people are our greatest assets.
3. We are **ONLY** looking to hire individuals that have integrity, passion and are looking to be the best.
4. The company is small and is in its growth phase, which means there are plenty of growth opportunities for the right individuals. We also provide ESOPs.
5. We believe a person’s time is the most valuable resource they have, since most of our time is spent at work we believe it needs to be a fun and exciting place to be. We make sure our team members find each and every role meaningful and fulfilling.
6. We want to make the greatest difference in the quality of life for the families that have trusted us with their savings.

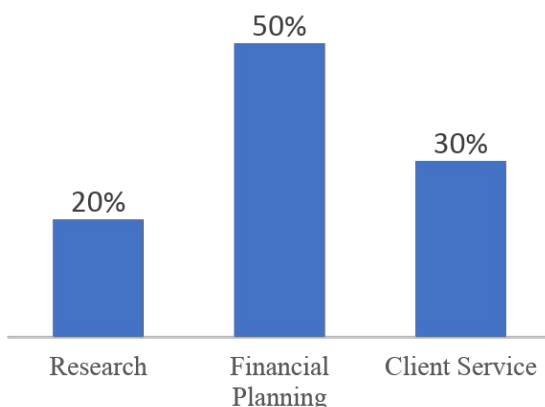
#### 2. What is the role?

**Senior Manager - Investment Advisory:** The following are the four pillars that steer advisor daily activities, playing a crucial role in our organizational success

**Ideal Candidate:** Candidates with Master’s degree in Business Administration, Finance, or related field are preferred and should have 2 years of relevant experience with CFP pursuing or NISM Investment Advisory-A & B tests, Must have a Post Graduation or an Professional Degree.

#### Daily Activities

(est time allocation )



#### Pillar 1: Research

- Track the performance of invested funds.
- Attend fund manager calls to reconcile internal research with their opinions and understand the framework.

#### Pillar 2 : Financial Planning

- Develop financial plans and deliver presentations to clients as needed.
- Collaborate with team leaders to gather data.
- Maintain and update client data, and revise plans annually or as needed in response to significant changes.

#### Pillar 3 : Client Service

- Obtain necessary documents and supplementary information from clients or team leaders during onboarding.
- Conduct purchase cost analyses upon request.
- Address client inquiries and resolve issues as needed.

**Salary Range** Up to 10 lac pa ( excluding bonus & Incentives)

**Mode of work:** Work from office (5days a week)

**Location:** Banjara Hills, Hyderabad

For company information, please visit our websites: [www.gcia.in](http://www.gcia.in), [www.guardianholdings.in](http://www.guardianholdings.in),

<http://www.guardianassetmanagement.in/>.

You can also read about us at <https://yourstory.com/2020/02/guardian-capital-investment-banker-snapdeal-zomato>.