

SYNOPSIS

The selected candidate will work with the Partner heading the Transaction Advisory Services division of Dewan P. N. Chopra & Co. for driving and managing the investments of high net worth individuals.

He/she shall independently interact with Senior Management/Promoter Groups of existing and prospective Multi Family Offices which include industry leaders from diverse sectors.

Designation	Director- Multi Family office
Estimated CTC Range	Commensurate with skill set & experience.
Requisite Qualification	Chartered Accountant, CFA & /or MBA (Finance) from a reputed Business School
Requisite Experience	Min. 10 years of post-qualification experience

Key Responsibility Areas (KRA's)

Client Engagement & Delivery

- Advise on strategic plans for investing decisions to meet the financial and wealth management needs of Multi Family Offices.
- Provide expert guidance including on investment strategies and risk management to Family Offices across asset class.
- Prepare and present regular reports to clients as per their specific family office requirement.
- Advise on and implement process improvement by reviewing internal practices and SOPs for family office services, finance and accounting operations.
- Stay abreast with industry trends, best practices, regulatory changes, and market Intel to make informed decisions and adapt strategies accordingly.
- Collaborate with external partners in India and outside, such as legal, financial, secretarial and accounting professionals, to offer comprehensive services to clients.

- Develop, maintain and explore a strong network within the financial industry to enhance the firm's reputation and business opportunities.
- Cultivate and maintain strong relationships with existing clients, and actively seek opportunities to expand the client base of family offices and UHNIs.
- Oversee and manage the day-to-day operations of the multi-family office, ensuring efficient and effective service delivery for the client.

People Development & Knowledge Sharing

- Lead a team of professionals including financial advisors fostering a collaborative and results-driven culture
- Manage, coach and build a strong team with the ability to mobilize and inspire them.
- Drive retention and growth of people. Deploy a process to bridge the learning gap.
- Create an environment to enhance camaraderie, promote Firm's culture, core values and ethics.
- Champion knowledge sharing efforts, review and continually improve processes so that the team and firm capture and leverage deep knowledge.

Ideal Candidate Profile:

- Proven experience in a senior leadership role within family office, a multi-family office or similar wealth management setting.
- In-depth knowledge of financial planning and investment management.
- Critical and strategic thinker who thrives in a quick pace, ever changing, complex environment.
- Demonstrated commitment to ethical business practices and client confidentiality
- Good business acumen and problem-solving ability.
- Strong Networking and relationship building skills
- Good Communication and Presentation Skills

- Should have a strong academic background from recognised institutions.

A Brief about the Company

D P N C Advisors is the consultancy arm of Dewan P.N. Chopra & Co., Chartered Accountants, a top 15 CA Firm in India rendering Transaction Advisory and Transaction Support services. The Company is engaged in raising equity and debt capital and supporting clients through the entire capital raise process including carrying out Due Diligences, Valuations, Deal Negotiations, Definitive Documentation etc.

The Company has garnered extensive experience offering services to some of the leading Family Offices, Start Ups, Financial Institutions and Corporates in and outside India and was ranked as 'Top 3 Transaction Advisor in India' by Venture Intelligence for Calendar Year 2022 and ranked amongst Top 10 in 2021, 2020 and 2019.

DPNC also operates as a Multi Family office advising some of the largest families and UHNIs on their investment strategy including planning, execution, monitoring and exiting investments across asset class. Our financial expertise combined with deep knowledge of tax, regulation, accounting etc built over 80 years of operations enables DPNC group to operate as a leading Multi Family Office service provider in India.