# **Designation:**

Sr. Analyst-Customer Success

# **Company Profile**

Asset Vantage was founded in 2011 by a family office and technology group as a next-generation, SaaS technology-based asset management, accounting, and reporting system catering to the highly demanding needs of customers ranging from individual wealth holders to fully staffed family offices and those professionals that serve them. ***Our vision is to empower families and their trusted advisors to make better investment decisions with a complete picture of their wealth.***

Our fully configurable family office software platform provides financial data aggregation across all asset types, an integrated general ledger for accounting/reconciliation and comprehensive portfolio reporting/analytics across all asset classes, currencies, advisors, and geographies.  
***We are the one-stop software solution to help family offices run like a business.***

More than 300+ of the world’s wealthiest families, representing combined assets of over USD 300 Billion in value, use our platform to automate their operations to drive better financial outcomes. We serve them through single-family offices, multi-family offices, CPA firms, trusts and financial institutions. ***AV has the distinction of being the only platform that’s truly global serving users across the Americas, UK, Middle East, Asia, and Oceania.***

AV’s best-in-class technology, combined with its premium managed services, offers an unparalleled and highly configurable solution at a fully transparent and competitive price point. ***The holy grail of value that family offices have always been searching for is now here.***

For more information, visit [www.assetvantage.com](http://www.assetvantage.com)

# **Job Roles & Responsibilities:**

* **Customer Training and Support:** Provide training to clients on the onboarding of historical data and ongoing data entry. Ensure that investment data entered in the system reconciles with investment statements and provide training on methods for this reconciliation.
* **Relationship Management:** Build and maintain long-term relationships with customers and their finance teams. Act as the primary point of contact for communication with India-based customers.
* **Communication of Product Features:** Ensure effective communication of product features, roadmap updates, and other important information to existing customers.
* **Process Development:** Develop and maintain robust processes for tracking implementation progress, ongoing services, and client communication.
* **Post-Training Support:** Maintain regular contact with the customer’s finance team post-training to ensure seamless onboarding of data and review of reports. Address and resolve any queries that arise.
* **Coordination and Updates:** Coordinate periodic updates with the finance team regarding upgrades, new features, and bug fixes.
* **Issue Resolution:** Understand, identify, and track issues or bugs in the system for resolution.
* **Feature Optimization:** Identify potential feature upgrades and optimizations based on client interactions and feedback.
* **Problem Identification:** Quickly identify and resolve issues related to internal and external system concerns.
* **Investment Management Knowledge:** Learn and understand investment management and accounting principles, including different investment structures (custodians, banks, etc.) and transactional feeds from these sources.
* **Data Feed Management:** Explore and understand various types of data feeds on bankable assets (e.g., equities, mutual funds, bonds, hedge funds), identify data sources, and ensure data is cleansed and aligned with the platform’s requirements.

# **Technical Skills:**

* Familiarity with investment management and accounting practices. Ability to learn new systems and tools quickly.
* Experience with data management and understanding of investment data feeds is a plus.

# **Personality & Interpersonal Skills:**

* Strong communication and relationship-building skills. Ability to understand and explain complex product features and processes.
* Strong problem-solving skills with the ability to identify issues and implement effective solutions.
* Ability to streamline functions and passion to learn and grow.

# **Qualifications and Experience:**

* 1-3 years experience
* B.Com or M. Com degree required (Master’s degree in accounting/Finance/Economics)
* Finance or Accounting are preferred major fields.

# **Location:**

**Mumbai**

**Working Days: - Monday to Friday in work from office mode**

**Shift Time: 1-10.00pm**