# **Designation:**

**Associate Director-Product Management**

# **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:**

**Job Roles and Responsibilities :**

* Continually refine and execute the product vision, strategy, and roadmap aligned with company goals and market trends.
* Conduct market research, competitive analysis, and gather customer feedback to identify opportunities for product innovation and differentiation.
* Collaborate with engineering and design teams to translate product requirements into user stories, wireframes, and prototypes.
* Drive the agile development process, prioritize feature backlogs, and ensure timely delivery of high-quality releases, working closely with engineering and from a user acceptance perspective.
* Build strong relationships with key customers, industry partners, and stakeholders to gather insights, validate product concepts, and drive customer-centric innovation.
* Conduct usability testing, analyze user behavior, and iterate on product features to optimize user engagement and satisfaction.
* Collaborate with sales, marketing, and customer support teams to ensure alignment on go-to-market strategies and product messaging.
* Track key performance indicators (KPIs) to measure product success (Net Promoter Score and Net Run Rate, Customer Lifetime Value) and track progress against goals.
* Define and analyze product use metrics, user feedback, and market trends to identify areas for improvement and optimization.
* Rally stakeholders, business heads and management members to prioritize the strategic product to the business, process improvements, new initiatives, and competitor analysis.

# **Technical Skills:**

* Strong negotiation, communication, and presentation skills. Excellent communication and presentation skills, with the ability to articulate complex investment and accounting concepts and solutions to diverse audiences.
* Proactive and self-motivated with a results-oriented mindset.
* Proven track record of building and maintaining client relationships.

# **Qualifications and Experience:**

* Must have CA or CFA degree.
* 10-12 years of total experience within the financial services sector with 5+ years of product management experience in the fintech, wealth management, or related industry, with a proven track record of success in delivering innovative products and leading high-performing teams.
* Deep understanding of wealth management industry trends, technologies, and regulatory landscape, with a passion for driving positive change and disrupting the status quo.
* Knowledge and experience with SAAS products are a significant advantage.

# **Location:**

**Mumbai**

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