

JOB PROFILE:

- **Job Title: Operations Executive (Full Time Role)**
- About the company: Opportune wealth is an upcoming Investment advisory firm and mutual fund distributor (Website: www.opportunewealth.com)

JOB DESCRIPTION:

- Processing of sign-up forms of new clients; sending them to our broking team.
- Maintaining client trade data in a software portal and providing the same to clients, as and when required.
- Communicating execution of trades / IPO applications with clients and trader.
- Calculating Portfolio returns on Microsoft Excel using XIRR formula and trade data manually.
- Learning data extraction software used for equity research and mutual fund research. Providing data and charts, as and when needed by management.
- Accuracy with data and advanced excel skills needed.
- Excellent communication skills and people skills
- Ability to work independently with limited guidance or day-to-day oversight.
- Ability to work in a high-pressure environment. Ability to multi-task and work with a Can Do attitude.
- Strong ethics and integrity.

Office Timings: Monday to Friday (9:00 AM to 6:00 PM) – Occasional Saturdays for pending work, if any.

Office Location @ NARIMAN POINT, MUMBAI

Opportune Wealth Advisors Private Limited

Office No. 309, Floor-3, Plot-221,

Maker Chamber V, Jamanlal Bajaj Marg,

Nariman Point, Mumbai – 400 021

Contact No. : +91 8657444326

Interested Candidates should email: opportunewealth@gmail.com

COMPANY PROFILE OF “OPPORTUNE WEALTH ADVISORS PRIVATE LIMITED”

ABOUT US:

Opportune Wealth Advisors Private Limited offers a complete range of wealth management solutions including financial planning, direct equity investments and mutual fund investments.

Our aim is to help our clients grow and preserve their wealth, in a manner that helps them achieve their financial goals. We help clients allocate their capital in a way that will ensure long term appreciation of their wealth and purchasing power over time.

While advising on equity investments, we conduct fundamental research to find quality companies, whose value per share we hope will appreciate manifold over the next 10 years to 20 and 30 years.

PROFILE OF OUR FOUNDER:

SURUCHI JAIN, Managing Director and Founder

Suruchi Jain holds an MBA in Finance and Accounting from the University of Chicago – Booth School of Business, and a post-graduate degree in Economics from Mumbai University.

Suruchi Jain an expert on equities. She was an Equity Research Analyst with Morningstar tracking Indian equities, for four years before she founded Opportune Wealth Advisors Private Limited in 2016. She comes from a family of investors and finance professionals, with high integrity and honesty as a core value.

As part of her work at Morningstar, Suruchi often appeared on television channels and was frequently quoted in the press. Below are links to her past stock calls covered by the media.

Team Strength

We presently have a team of five employees and one part-time employee. We have mutual fund distribution license and investment advisory license. We are preparing to go for Portfolio Management license in the future.