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# Example of Private Wealth Management Asia Job Description

Our company is growing rapidly and is looking for a private wealth management asia. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for private wealth management asia

* Provide product and risk training to Sales Teams and Product Teams to promote risk awareness and culture
* Participate in product related projects to enhance controls
* Facilitate the development of strategic and tactical solutions with business partners
* Establish project scope and define business needs with stakeholders and various other functional groups
* Manage and undertake end-to-end project tasks from feasibility study, requirement analysis/documentation, and UAT management (including UAT test script) to implementation support
* Provide administrative support to IRs on client meeting and business trip arrangement and expense reimbursement
* Participate in initiatives to streamline workflows
* Arrange/Coordinate travel arrangements & accommodation for managers and team in accordance to Firm’s policies and procedures
* Arrange/Coordinate schedules for visitors from global offices
* Prepare and process Managers’ expense claims, and checking of team expense claims in accordance to Firm’s policies and procedures

## Qualifications for private wealth management asia

* Review the documentation pack from Sales including the Client Identification Program (CIP) required documents, the Account Application forms, Investment Profile Questionnaires, Tax documents and other documents
* Review the Corporate Security report for Negative News, Source of Wealth (SOW) corroboration and Total Net Worth substantiation
* Prepare all low/medium risk accounts for AMT signoff and flag any concerns or exceptions to AML/Compliance for further review and discussion
* Knowledge of account structures of various complexity, including personal holding companies, trusts, foundations, a plus
* Knowledge of CIP/AML requirements for onboarding High Risk clients a plus
* Minimum of 5 to 8 years of experience as Recruiter within a recruitment consultancy or similar role in the banking/financial industry