

## **Relationship Manager – Job Description**

Upside AI is a tech-based investment management company. Upside AI was founded on the idea that technology will make better decisions over humans in the long run and is therefore building India's leading tech-first asset management platform.

In the two years since Upside AI has been live, we have delivered best in class returns for investors and grown our AUM to Rs 600 mn organically. We have raised a round of funding from marquee investors like Endiya Partners, Vijay Kedia (veteran public markets investor), Ajay Nanavati (ex-Chairman, Syndicate Bank) and Gopichand Katragadda (ex-CTO of Tata Group).

We are looking to expand the team and hire a Relationship Manager. If you are interested in the role, write to us at [careers@upsideai.com](mailto:careers@upsideai.com)

### **Job description**

- Client onboarding documentation and KYC
- Client servicing (responding to queries, sharing monthly and quarterly reports of performance)
- Back-office assistance with accounts and billing

### **The Successful Applicant**

- Has spent 1-3 years in wealth management/ investment advisory/ PMS/ asset management
- Educational qualification: B.Com (minimum) + CA/MBA (preferable)
- Financial literacy, proficient in Microsoft Excel/Word/PowerPoint
- Excellent communication skills are a must since this is a client facing role (English and Hindi)
- Confident self-starter with attention-to-detail and ability to adapt in a dynamic work environment
- Passionate and enthusiastic to build a tech led AMC from the ground floor

### **Compensation**

- Outstanding package and incentives