VT Outsourcing Pty Ltd & V Trust Global

Client Service Officer / Admin

Position	Client Service Officer / Admin
Company	VT Outsourcing Pty Ltd & V Trust Global
Location	Ahmedabad, India
Job Type	Full-Time
Job Category	Financial Planning / Wealth Management

Position Overview

VT Outsourcing Pty Ltd & V Trust Global is seeking a professional, organised, and client-focused individual to join our team in Ahmedabad as a Client Service Officer / Admin. This role is integral to supporting our Australian financial planning and wealth management clients by delivering exceptional client service and efficient administrative assistance.

You will serve as a key point of contact for clients and advisers, ensuring smooth day-to-day operations and a high standard of service delivery across all administrative and client-facing functions.

Key Responsibilities

- Serve as the primary point of contact for client enquiries, ensuring timely and professional responses via phone, email, and other communication channels.
- Coordinate and manage client onboarding processes, including collection and verification of required documentation.
- Prepare, review, and process a range of administrative documents including client correspondence, forms, and agreements.
- Liaise with Australian financial advisers, paraplanners, and third-party providers on behalf of clients to facilitate smooth service delivery.
- Maintain accurate and up-to-date client records within CRM and financial planning systems (e.g., Xplan, AdviserLogic).
- Schedule and coordinate client appointments, meetings, and follow-ups for advisers.
- Assist in the preparation of meeting packs, review documents, and client reports as directed by the advice team.
- Monitor and track outstanding tasks, ensuring all client requests and deadlines are met promptly.
- Support compliance processes by ensuring all client files and documentation adhere to Australian regulatory standards.
- Contribute to team efficiency by identifying opportunities to improve administrative processes and workflows.

Qualifications & Skills

- Bachelor’s degree in Business Administration, Finance, Commerce, or a related field.
- Prior experience in a client services, administration, or financial services support role is preferred.

- Strong written and verbal English communication skills with a professional and client-friendly manner.
- Excellent organisational and time management skills with the ability to handle multiple priorities simultaneously.
- High attention to detail and commitment to accuracy in all tasks.
- Understanding of Australian financial planning, superannuation, or wealth management concepts is an advantage.
- Proficiency in Microsoft Office Suite (Word, Excel, Outlook) and experience with CRM or financial planning software is desirable.
- A proactive, team-oriented attitude with a strong work ethic and willingness to learn.

What We Offer

- Competitive salary package commensurate with experience and qualifications.
- A supportive, collaborative team environment within a professional outsourcing firm.
- Exposure to Australian financial planning and wealth management industry operations.
- Ongoing training, mentoring, and professional development opportunities.
- Clear pathways for career growth within the organisation.
- Stable, full-time employment with VT Outsourcing Pty Ltd & V Trust Global.

To apply, please submit your resume and a brief cover letter outlining your relevant experience to our HR team.

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