Senior Salesforce Consultant – Wealth Management Implementation

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Job Summary

Vacancy :
Deadline : Jan 01, 1970
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Employment Status : Full Time
Experience : 5 - <10 Years
Salary :
Gender : Any
Career Level : Any
Qualification : B.Tech

Job Description

Exp: 7+ Years

Role Overview

We are looking to onboard a seasoned Senior Salesforce Consultant who can spearhead a mission-critical transformation initiative for a leading wealth management client. This role demands a powerhouse professional who brings deep domain acumen across financial services and a proven track record of architecting enterprise-grade Salesforce ecosystems tailored for RIAs, broker-dealers, and wealth advisory firms.

The ideal candidate will operate as a strategic thought partner, driving solution architecture, orchestrating end-to-end delivery, and enabling a future-proof Salesforce landscape aligned with stringent regulatory, compliance, and operational frameworks within the wealth management industry.

Key Responsibilities

• Lead the full-cycle Salesforce implementation for a wealth management client, ensuring scalable, compliant, and high-performance architecture.
• Design and develop enterprise-level Salesforce solutions, including data models, automation frameworks, security architecture, and Financial Services Cloud (FSC) configurations.
• Translate complex wealth management workflows—household structures, advisor-client hierarchies, investment processes—into robust Salesforce capabilities.
• Drive integration strategy with portfolio management platforms, reporting tools, custodial systems, and other upstream/downstream technologies common in the advisory ecosystem.
• Collaborate cross-functionally with consulting teams, business stakeholders, and leadership to gather requirements and operationalize best-practice CRM and data flows.
• Ensure platform stability and adoption, providing ongoing optimization, documentation, governance recommendations, and enablement support.
• Champion compliance-driven design, ensuring alignment with RIA, broker-dealer, and industry regulatory mandates.

Required Experience

• **Mandatory:** Multiple successful Salesforce implementations specifically for wealth management, RIAs, or broker-dealers.
• Proven expertise with Financial Services Cloud (FSC) or equivalent advisory-focused Salesforce frameworks.
• Hands-on experience architecting complex client, household, and advisor models, with deep familiarity in financial services workflows.
• Strong architecture capabilities spanning data modeling, security design, integration patterns (APIs, middleware, 3rd-party platforms), and automation strategies.
• Exposure to fintech and wealth tech integrations, including PM systems, CRM add-ons, reporting and analytics platforms, custodial data pipelines, etc.
• History of client-facing consulting leadership, with the ability to translate strategic business requirements into scalable technical roadmaps.
• Exceptional documentation, stakeholder management, and solution governance skills.

Success Indicators

• Delivery of a highly scalable, compliant, and maintainable Salesforce environment that accelerates advisor efficiency and client engagement.
• Clear, actionable documentation and architectural recommendations to drive long-term platform sustainability.
• Seamless collaboration with internal teams and end-client stakeholders, ensuring timely adoption and operational uplift.
• Integration landscape optimised for unified data flows and enhanced reporting accuracy.

Education & Experience

Must Have

Educational Requirements

B.Tech

Compensation & Other Benefits