

Relationship Manager Privilege

- 1.Acquire quality clients through networking, database, market intelligence and references from existing clients.
2. Generate Cross Sell revenue through Financial Planning.
3. Promote Focus Product of the month.
4. Maintain records of business on internal software.
5. Induct new clients to the Central Dealing Desk for smooth interaction and services.
6. Liaison with Central Dealing Desk for revenue generation and query resolution.
7. Conduct activities for Client Acquisition and Financial Planning.
8. Ensure compliance as per various regulator and organization guidelines.
9. Maintain the brand image of the organization.
10. Products like - MF, Insurance, Broking, FD, Bonds, PMS, FD and Wealth Mgmt Services.

Other Job Responsibilities -

- 1.Market Intelligence - Identify potential threats and opportunities.
2. Maintain a congenial work environment.
3. Maintain the brand image of the organization.

Job Specification

Experience 1 year or more experience

Qualification Graduate and above

Industry Banks, Insurance Co., distribution houses