Job Description – Account Manager

An Account Manager's role is to support the Relationship Manager (RM) in building and maintaining wealth management business.

Role:

1. Financial Planning, Portfolio Strategy, Reporting & Client Servicing

    a. Assisting the RM in making of financial plans for clients keeping in mind Client requirement

    b. Reporting the performance of the portfolio at regular intervals and highlight the asset allocation and IRR.

    c. Highlighting to the RM how clients' actual portfolio is in variance with the strategic plan and actionable to get the portfolio aligned to the strategic portfolio.

    d. Identifying opportunities within the client existing portfolio based on product team recommendations across –
        - MFs,
        - Market Linked Debentures (MLDs)
        - Change in the house view on various asset classes
        - Alternatives

    e. Attending to client queries

2. Support the RM in Business development
    a. Help acquire a database of prospective clients
    b. Maintain the database of referrals
    c. Assist in Business development

3. Documentation
    a. Filling up applications and executing transactions of clients, including non-financial transactions (like change of bank mandate)
    b. Filling up and executing MF, MLD etc. transaction of clients
    c. Opening broking / DP account

Competencies / Skills:

- Knowledge in finance domain
- Good Communication & Presentation skills