Job Description of WM

1- To Develop & Manage Client relationships in order to enhance and acquire more AUM.
2- Align AUM as per Client's Financial Strategy to reduce Risk, Cost, & Tax also to enhance desired returns & Volatility of the portfolio.
3- Review/Service portfolio to create a wow experience for clients
4- On board new relationships -Clients acquisition
5- Conduct Marketing activities to increase no of clients managed
6- Learn new skills and knowledge to service clients better
7- To maintain full ethics in providing services and analysis
8- Work closely with the product teams for delivering specialized advice