Job Description for Preferred Relationship Management - Wealth

Designation: - Manager/Senior Manager/AVP/VP.

SUMMARY: -

The Relationship Manager-Wealth is the ultimate face of the business as (s) he is going to be the final point of contact with the client. (S)he would be responsible for acquiring High Net Worth relationships and managing & retaining such relationships by delivering the best standards of services. (S)he would be expected to establish strong ties with them by designing & implementing their financial plans; and then by ensuring that they receive and execute on the right advice.

PRE-REQUISITES: -

- Relationship Managers with prior experience working in a Private bank/wealth management set up.
- Handle and manage clients with a minimum Investment amount of Rs 1 Cr and above.
- Experience of advising clients across asset classes.
- Strong analytical skills and ability to work in teams.
- Candidates having good vintage in their present as well as previous companies (At least minimum tenure of 2-3 yrs of stability)

ROLES & RESPONSIBILITIES: -

- The Relationship Manager will be Responsible for Acquiring Preferred clients (Affluent & Super Affluent)
- Maintaining client relationships and generate AUM from preferred clients.
- Advising Affluent & Super Affluent clients on their Investments and managing their overall financial portfolio and deepening the wallet from existing clients
- Track the Affluent & Super Affluent Client segment in the market for new client acquisition
- To research, investigate and update themselves on available investment opportunities/financial market trend to determine whether they fit into clients portfolios.
- To coordinate with product and research team (Centralize CFP Team) for taking investment decision for the clients.
- To conduct and assist in organizing seminars, workshops and other business development activities.

JOB SPECIFICATIONS REQUIRED:

Qualifications: -

An MBA/PGDM – (Finance/Marketing) Degree holder or focused education in Financial planning/Wealth Management. Other qualifications like CFP will be an advantage.

Experience – Minimum 3-15 yrs in handling HNI Relationship, Sales & Financial Planning of HNI Clients from BFSI sector with good business / market knowledge. Having experience of handling HNI Client Acquisitions and Relationship Management & service.

Desired Skill Set:

- Ability to inspire trust and confidence in clients.
- Ability to engage clients in meaningful conversations about their finances and take active interest in their financial well being.
- A thorough understanding of financial markets, their behavior, movements and expectations with respect to market.
- Ability to process several inputs provided by research team and other sources and apply them to the specific context of several clients – thus generating insights for clients
- Good oral and written communication skills with clarity of thought, speech and expression
- Good interpersonal skills
- Good Analytical Skills

General Competencies:

- Positive attitude, socially effective, high level of perseverance and patience
- Assertive & hard working
- Result oriented