

Designation: - Sr. Manager / AVP

Job Description for Preferred Relationship Manager -Wealth

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.
- Selling of products : **Mutual Funds, PMS, Structured Products.**
- 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.