

JD for HNI Desk Head:

(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 execute on the right advisory.

PRE-REQUISITES: -

Candidate with prior experience working in a Wealth Management/Private Banking set up, experienced in driving sales through advisory approach of **Mutual Funds, PMS, Structured Products and Bonds** is a must.

Overall experience of around 10-15 years in the desired role with team management experience of min 3-4 years.

Team managing and handling in the current experience is a must.

Should have own set of Client relationships and AUM and also the team client relationships.

ROLES & RESPONSIBILITIES: -

➤ (Target- Individual + Team Target)

- AUM Building & Revenue Generation
- Recruitment and managing a team of Relationship Managers / Senior Relationship Managers.
- The Relationship Manager will be Responsible for acquiring Privilege clients (HNI/Ultra HNI) (having min AUM of Rs5 Cr & above clients).
- Recruiting, training and ensuring seamless induction to the newly joined team members and managing attrition within the team.
- **Focus Products: Mutual Funds, PMS, Structured Products. (**No Insurance & Retail Broking)**