

JD for Preferred RM Head:

The Privilege Desk Head is the ultimate face of our vertical, 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 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.

Should have stability of minimum tenure of 3-4 years in the current organization.
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)**