ING Vysya BANK

Relationship Manager – Wealth Management

Location of Posting : Bangalore

Required Qualification : MBA/CA

Required Skills & Experience: Preferably 2-5 years in Banking industry.

Roles and Responsibilities:

EXPECTED END RESULTS	MAJOR ACTIVITIES
1. Acquire Platina Customers	- Acquire Platina customers
2. Deepen Relationships	- Manage the 250 – 400 customers of the branch who are defined as customers with relationships greater than 1 Lakh for Metro & Urban . And greater than 50,000 for Semi Urban and Rural. - Grow the CASA of this portfolio - Cross-sell mortgages, credit cards and drive channel migration - Acquire more customers from the same household - Service these customers
3. Wealth Management	- Do a Financial Needs Analysis and Risk Profiling for the customers in the portfolio. - Design a investment portfolio and plan based on ING model portfolio's - Periodic Portfolio reviews for all customers - Cross-Sell investments, life insurance, general insurance and SIP. - Ensure all customers have a CASA for routing their investments. - Ensure all customers use the Iflex wealth management system
4. Compliance	- Ensure AMFI and IRDA certification - Ensure all customer instructions are executed the same day - Ensure 100% documentation of all transactions.
5. Branch Development	- Conduct branch Insurance & Investment seminars to spread financial awareness.

To apply to the above position, please return to the 'Careers' page, and send us your detailed resume. Thank you.