

**“Relationship Manager-Wealth Management”**

**Group :** Retail Banking

**Location of Postings:** Indore

**Required Qualification:** Graduate/MBA

**Required skills & Experience:** 2+ sales experience in Wealth Management (Mutual fund & Life insurance sales)

**Roles & Responsibility**

EXPECTED END RESULTS	MAJOR ACTIVITIES
1. <b>Acquire Platina Customers</b>	1. Acquire Platina customers
1. <b>Deepen Relationships</b>	<ul style="list-style-type: none"> <li>- Manage the 250 – 400 customers of the branch who are defined as customers with relationships</li> <li>- Greater than 1 lakh for Metro &amp; Urban. And greater than 50,000 for Semi Urban and Rural.</li> <li>- Grow the CASA of this portfolio</li> <li>- Cross-sell mortgages, credit cards and drive channel migration</li> <li>- Acquire more customers from the same household</li> <li>- Service these customers</li> </ul>
3. <b>Wealth Management</b>	<ul style="list-style-type: none"> <li>- Do a Financial Needs Analysis and Risk Profiling for the customers in the portfolio.</li> <li>- Design a investment portfolio and plan based on ING model portfolio's</li> <li>- Periodic Portfolio reviews for all customers</li> <li>- Cross-Sell investments, life insurance, general insurance and SIP.</li> <li>- Ensure all customers have a CASA for routing their investments.</li> <li>- Ensure all customers use the Iflex wealth management system</li> </ul>
4. <b>Compliance</b>	<ul style="list-style-type: none"> <li>- Ensure AMFI and IRDA certification</li> <li>- Ensure all customer instructions are executed the same day</li> <li>- Ensure 100% documentation of all transactions.</li> </ul>
5. <b>Branch Development</b>	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.**