“**Relationship Manager-Wealth Management**”

**Group : ** Retail Banking

Location of Postings: Nasik

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. Acquire Platina Customers	1. 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 To apply to the above position, please return to the ‘Careers’ page, and send us your detailed resume. Thank you.