

“Relationship Manager-Wealth Management”

Group : Retail Banking

Location of Postings: Panaji

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	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> - 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.