ING Vysya BANK

Relationship Manager - Wealth

Location of Posting : Anathapur.

Required Qualification : MBA, Previous experience in wealth management.

Required Skills & Experience :

- Culture to meet new customers and acquire them
- Interest in financial markets and desire to help customers invest properly
- Service orientation to manage own customers
- Ability to understand complex investment products.

Roles and Responsibilities :

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