

Job skill Requirements

Financial Services experience with specific expertise of various investment vehicles and mutual fund products (eg: asset allocation portfolios, equity products, fixed income strategies).

Achieve sales and business targets, including client acquisition and AUM building by promoting the firms products to various high net worth clients.

Manage end to end delivery of sales/marketing initiatives

Work with various AMCs on consistent basis to achieve the monthly and yearly targets.

Multi disciplinary focus with technical and business knowledge, financial expertise and strong communication skills in order to translate them into organisational goals.

Skill to understand and assess the client's risk profile and time horizon to enable us to suggest funds that would suit the client's requirements and goal of long term wealth creation.

Must be able to work independently and take others along as a team leader.

Detail oriented, organised and excellent documentation skills.

Responsibilities and Targets

- 1) Acquisition of new clients on monthly basis.
- 2) Addition to the AUM on monthly basis in terms of new acquisitions.
- 3) References from the existing clients
- 4) Targeting clients for tax saving mutual funds
- 5) Conducting monthly meetings with existing clients to understand their fresh requirements and evaluation of the existing portfolio.
- 6) Weekly reviews in the organisation.
- 7) Acquiring associates on monthly basis and extracting performance from them.
- 8) Targets on new NFOs being launched in the market
- 9) Weekly sessions on various aspects of mutual fund industry/new funds/compliances etc.