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JD Wealth Management - Transaction Manager

The position will be directly responsible for interfacing and engaging with Clients on a day to day basis. This position requires effective and efficient sourcing and processing of Investment products requirements of Clients such as Mutual Funds, Life Insurance, PMS, etc. basis of their Risk profile.

Key deliverables:

1.Monitor and address HNI clients banking and Investment requirements

Use financial acumen and investment expertise to review a client's personal data, align clients need through superior service, seamlessly align service delivery for enhanced experience; thereby helping the client reach short term and long term investment goals

2.Focus on business development across liabilities, assets & fee to sustain and achieve growth in relationship value, revenues & improved client stickiness

Achievement of product-wise targets and cross selling products as per the demographic, lifestyle and risk profiling

3.Formulate outbound and inbound sales plan to Service HNI Clients for increasing customer wallet share.

4.Conduct risk profiling of all mapped clients and showcase investment products as per the Client risk profile

5.Ensuring client contractability at all times through updating of latest contact details in all necessary systems. Regular contact with all mapped clients through weekly / monthly calls

6.Resolution of queries for all managed clients within TAT specified

Key skills:

Ability to manage relationships to improve relationship value of existing Clients

Experience in building and maintaining long term relationships, deepening relationship and growing revenues for the organization

Aptitude towards delivering high quality customer service with good organizational and interpersonal skills

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Decision making skills with strong sense of ownership and ability to work under pressure

Ensure compliance with key regulatory and bank level requirement

Passion: Constantly raises the bar for self & team, has a strong execution bias, takes initiatives even in the face of significant difficulties

Customer First: Leverages every customer interaction as an opportunity to make an impact, consistently seeks to understand customer needs, is accessible and responsive

Experience - 1 to 2 Years Experience in Wealth Management Industry or a Fresher with High Acumen / Passion to Develop Wealth Management Skills

Education - Bachelors in Commerce/Accounting/Investments/Finance and Other Related Fields. Masters and Certifications is an Added benefit

Communication - Fluent Spoken English and Written English is a Must

Salary - As per market standards.