

Relationship Manager - Investment Services

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Company: Wealth Premier Finserv

Location: maharashtra

Category: other-general

Title – Relationship Manager – Investment Services

Qualification Required – Graduates & NISM VA

Job Responsibilities:

- Existing Customers – Relationships Mapped
- Responsible for managing relationships with clients & providing investment advisory services
- Monitoring and managing client portfolios, developing and implementing investment strategies
- Get the Risk Profiling Done
- Portfolio Reviews with Clients
- Get Investment Top ups and increased Wallet Share
- Get References

- New Customers
- Responsible for Adding New Relationships & Acquire NRI Relationships
- Arranging for Investor Awareness Programs in Corporates
- Providing Solutions to them via various financial products and services like Mutual Funds, Portfolio Management Services & other Investment Products

- Research & Knowledge
- Knowledge of Financial Products and being well read about Market, and keeping up with

market trends and news

- Attending Fund Manager Calls and Product calls and Meetings
- Get Acquainted with Morning Star Research Platform and other Software's for Analysis
- Research and Analysis and Shortlisting of various Mutual funds schemes, PMS and other Investment products

Other Requirements – Good Analytical and Communication Skills

- Experience – 1 - 2 Years.
- Compensation– As per Industry Standards.

Contact Details:

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