

Relationship Manager - Investment Services

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Company: Wealth Premier Finserv

Location: Sion

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:herzel@wealthpremier.com, www.wealthpremier.com

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