

# RM – Wealth

**AUM Capital**, a premier financial brand, is seeking to add an accomplished and motivated individual to our team as a Relationship Manager – Wealth, to its rapidly growing Wealth Management business.

Founded in 1995, AUM is now the largest distributor of Mutual Fund products in Eastern India, with pan-India presence in more than 10 locations. Managing assets of more than Rs. 18,000 Crs, we cater to Large Corporates treasuries, Financial Institutions, Provident Funds, Endowments and HNI/UHNIs across the country.

## JOB SUMMARY

### RM - Wealth

The RM will be a key member of Wealth team.

The **primary responsibility** of RM will be to:

- 360 degree Financial planning of HNI, UHNI and Corporate clients
- Analyzing Risk profile of clients and pitching the right product.
- Selling various third party financial products of all AMC & companies like Mutual funds, Fixed deposits, PMS, Structured Product, Sovereign and Corporates Bonds, Home loan and LAP.
- Successfully developing and maintaining clients' relationship
- Understanding capital market scenarios and knowledge of Wealth
- Managing and building financial relationship with new HNI clients and Corporates, build portfolios of HNI clients.
- Competitive landscape understanding (Competitor activity, new product development).
- Sales promotions to increase client base

The **ideal candidate for this role shall have** high level of experience in Dealing with HNI clients and Corporate Treasuries, Good knowledge of financial products, superior Communication skills and providing best financial solution.

Excellent communication skills and negotiation ability will be key; must be comfortable with ambiguity and the demands that naturally arise from rapid growth.

## REPORTING TO

National and Co-National Head - Wealth

## DESIGNATION

Manager/ Chief Manager/ AVP

## SALARY

As per industry standard

## WORK EXPERIENCE

At least 3 years