

VP/AVP/Chief Manager/Sr. Manager-Wealth Management

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

AUM is 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. 25,000 Crs, we cater to Large Corporates treasuries, Financial Institutions, Provident Funds, Endowments and HNI/UHNIs across the country.

JOB SUMMARY

The candidate will be a key member of Wealth Team.

This is an individual role. (Not a team leading one)

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

- Advising/selling Ultra high Net worth Clients on various assets viz. PMS, MF, Direct and Pvt Equity, NCDs, Bonds, Corporate FDs AIF.
- Asset allocation, financial planning and risk management according to client risk profile.
- Acquiring New Clients, activation of inactive clients, client retention.
- 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
- Client servicing.

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

SALARY

As per industry standard