

## **VP/AVP/Chief Manager/Senior Manager** **– Wealth Management**

### **About the company**

AUM Capital is a leading financial services institution with a strong pan-India presence across more than 10 locations. Managing assets of over ₹11,000 crore, we serve Corporate Treasuries, Family Offices, Trusts, and HNI / UHNI clients across India.

For details: [www.aumcap.com](http://www.aumcap.com)

### **Job Summary**

- This is a pure sales and business generation role in the Wealth Management segment.
- The role is client-facing, focused on advisory, relationship building, and revenue generation.
- The role is not intended for pure retail wealth or operational profiles.

### **Target Client Segments**

- Corporate Treasuries
- Family Offices
- Trusts
- HNI & UHNI Clients

### **Product Focus**

- PMS, AIF
- Mutual Funds
- NCDs / Bonds
- Corporate Fixed Deposits
- Private Equity

The **primary responsibilities** of the WM will be to:

- Provide 360-degree wealth advisory and financial planning solutions to clients.
- Acquire new clients, reactivate dormant relationships, and drive consistent revenue growth.
- Build, lead, manage, and drive productivity of high-performing Relationship Managers in the Wealth segment, with clear focus on sales targets and business generation.
- Actively engage with clients, build long-term relationships, and expand wallet share.
- Track market trends, competitor activity, and new product developments to support sales efforts.
- Present MIS and performance updates to senior management.
- Ensure adherence to regulatory and internal compliance standards.

**Candidate Profile**

- Proven experience in hard core wealth sales, with a strong track record of client acquisition and revenue generation.
- Hands-on experience in managing Corporate Treasury / Family Office / Trust / HNI / UHNI clients.
- Strong advisory and selling experience, particularly in PMS and AIF, along with other wealth products.
- Excellent communication skills with a polished, confident client-facing presence.
- Minimum 3 years' experience in Wealth Management / Sales & Marketing
- (Higher experience preferred for senior designations).
- NISM VA, XA & XB preferred.

**Reporting To**

National Head / Co-National Head – Wealth