

# Wealth Manager

Ghaziabad, Ghaziabad District, Uttar Pradesh, India

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## Job Summary

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Vacancy : 1

Deadline : Apr 08, 2024

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Employment Status : Full Time

Experience : Any

Salary :

Gender : Any

Career Level : Top Level

Qualification : MBA

## Job Description

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Job Description: • Excellent communication skills. • Must have a bachelor's degree in business, marketing, finance or related field. • Over 5 Years of working experience in financial sector with direct sales and team handling experience. • Experience in serving high-net-worth individuals and understanding their unique wealth management needs. • Proven track record of achieving sales targets and building a successful client portfolio. • Recommending suitable investment products, such as equities, bonds, mutual funds and alternative investments, based on thorough market research and analysis. • Handling and providing financial services to HNI clients. • Manage client portfolios, keeping client plans up-to-date. • Strong analytical and problem-solving skills. • Proven track record of meeting sales targets. • Complete exposure to Product development, Pricing, and Launch. • Overseeing and conducting market research to develop and implement sales initiatives along with sourcing clients. • Developing and sustaining long-term relationships with customers. • Managing Sales and Sales Support, Project Sales. • Heading and responsible for Overall Sales, Collections, Gross.

## Education & Experience

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## Must Have

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## Educational Requirements

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MBA

**Compensation & Other Benefits**

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As per company policy