JOB DESCRIPTION: Wealth Manager / Senior Wealth Manager
Grade-Manager/ Sr Manager

About the Company:

Fisdom is an award winning, robo-advisory firm operating in the wealth management space. We currently offer investors a 360-degree wealth management platform for mutual funds and Insurance. Fisdom blends cutting-edge technology with conventional wealth management wisdom to make superior advisory accessible to all. Our focus is to help everyone maximize his/her wealth. For more info, visit: www.fisdom.com .We are growing and constantly looking for high performers to participate in our growth story.

Fisdom has just raised $ 11M in the last round led by NASPERS (ONE OF THE LARGEST VC GLOBALLY).

We partner with Banks (as digital partner) and own the Wealth Management Business of the bank. The current partnership includes PNB (Combined entity with OBC and UBI), Indian Bank (merged entity include Allahabad Bank), Lakshmi Vilas Bank, Karnataka Bank, City Union Bank to name a few apart for few Small Finance banks, Cooperative Banks and digital partnerships.

We strive to become largest digital wealth Management Company keeping customer experience at CORE.

Summary/Objective:
The Wealth Manager/ Senior Wealth Manager is responsible for representing the organization at our partner bank locations. He/she will make sure that the organizational footprint in the market is prominent and in turn generate sales and revenue by utilizing excellent, in-depth knowledge of company products & services.

Key Responsibilities:

1. Establish and support company's bank partnerships and achieve sales targets from these channels
2. Run and manage day to day business and operations for mapped partner branches
3. Prospecting and identifying new leads and pitching to the clients through partner banks
4. Maintain strong working relationships with the bank representatives for acquisition of new investment customers
5. Function as point of contact for customer support and ensure queries are resolved in a timely and professional manner
6. Focus on acquiring and onboarding a number of HNI customers that he/she has managed in the past to build incremental AUM.
7. Build and deepen the relationship with the existing customers to get an incremental share of their wallet.
8. Strive to acquire & generate leads from open market through cold calling
9. This will be an Individual contributor role

Education: Post Graduate

Skills/Competencies

1. Strong understanding of the Capital Markets & Knowledge of Mutual Funds, Insurance, Equity, Debt Markets
2. Customer/Client centric
3. Strong Teamwork Orientation & Collaborative skills.
4. Seamless Communication in English, Hindi and Regional/local language(must)
5. Results Driven
6. Ability to network & build long-term professional relationships

Experience:

1. 3-6 years of relevant relationship management and portfolio advisory experience
2. Candidates with a record of outperforming sales/revenue targets will be given prominence
3. The candidate should come with experience of marketing and selling financial products such as Mutual Funds, Insurance, Equity and Debt products.

Locations: Multiple cities in India

Job Specifications: This is a full-time position. Travelling maybe required 10 to 20 %

What is at offer:

Excellent work culture, opportunity to be a part of a growing organization with immense learning possibilities. All of this, along with top of the line remuneration and performance based pay