



JD - Wealth Manager

BFC Capital

Address-First Floor,2/10,VineetKhand,

Gomti Nagar,Lucknow

Contact-0522-4026940

www.bfccapital.com



About the company:

BFC Capital is a premier Wealth Management Company working on advisory model and is a SEBI Registered Investment Advisor (BFCIA) managing Funds of Corporate and Retail Clients.

The company offers unique range of Services like Corporate Investment Planning, Treasury Planning, and Financial Planning which involves Goal Based Planning, Tax Planning and Wealth Management.

The Company is managing Funds worth 5 Billion serving more than 500 Retail Families and more than 150 Institutional Clientele.

The company works on a Premium Segment and has been ranked in India's 20 Most Promising Wealth Management Consultants.

Position – Wealth Manager:

Preface:

The WM will be required to move into the market and promote services of the company, brief people about the utility of our services and handle operational and technical issues of our existing clientele.

Skills Required

1. Convincing Skills | Analytical Skills | Inter Personal Skills
2. Interest towards Sales & Field Activities
3. Self Motivated | Extrovert | Confident
4. Inclination towards Finance

KRA

1. Manage a Team of RMs and SRMs – Train and Upgrade the same
2. Manage Client Portfolios
3. Create Leads Pipeline
4. Arrange Participants for Events with the support of his Team
5. Acquire Clients from Leads provided by System
6. Stay Updated of Financial Market Events
7. Understand Financial Planning
8. Analyze and Improve Team's Performance
9. Strategies to ensure Team keeps achieving Annual Numbers
10. Plan & Organize BTL Activities as and when required

Job Location –Lucknow, Uttar Pradesh

Address – 2/10 Vineet Khand, Gomti Nagar, Lucknow(UP)-226016

Vacancy Type – Full Time

Package – Rs. 5 L to 9 L per annum

Experience – Min Exp – 1 year +

Qualification – MBA in Marketing/ Finance

Reporting – AVP – Retail Advisory

Job Detail –

As the company works on advisory model, the Wealth Manager will be responsible for the promotion, development and handling of client relationships related to financial planning and wealth management.

The capacity utilization of a WM will be as follows:

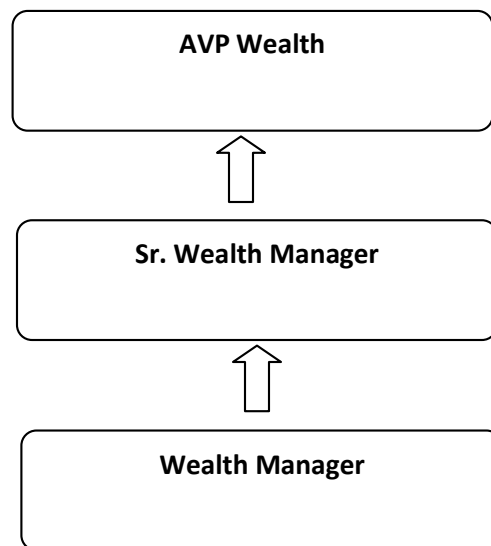
1. Marketing activities including moving into the market – 60%
2. Handling of portfolio including doing technical analysis- 30%
3. In house training for operational and technical issues – 10%

Performance Appraisal:

The performance will be assessed on the basis of quantitative analysis including creation of clientele and revenue generated during the period as well as qualitative analysis including the marks obtained in internal trainings and examinations, adherence to STD (Standard time duration), obedience and professional conduct.

Apart from fixed emoluments, The HR Policies of the company promotes various incentives and other rewards and recognition programmes.

Career Growth



Usually for an average candidate the transition from one position to next level takes a year.