



Let your money grow with us...

Job Description-Wealth Manager



Let your money grow with us...

1. About the company:

BFC Capital is a premier wealth management company working on advisory model having clientele across northern region of the country.

Services of the company are limited to selected clientele and fee based income is a preponderant part of the total revenue of the company.

Company runs on the highest level of ethics and standard. Rigorous in house trainings and personality development process is an inherent feature of the System.

2. Position –Wealth Manager:

Preface:

The Wealth Manager shall be responsible for Research/Analysis and recommending enhancements to further develop and maintain an effective wealth management strategy. This position is responsible for managing the delivery of our wealth management segment; coach, train and support our wealth management sales staff; oversee wealth management operations and support

As the Company works on Advisory Model, the candidate shall be responsible for the Promotion, Development and Handling of Client Relationships related to Financial Planning and Wealth Management.

The responsibilities of Wealth Manager shall include

- Delivering a consistent and tailored wealth management service.
- Developing long term, in-depth relationships with clients.
- Understanding client objectives and circumstances in order to ensure advice is up-to-date and relevant to them.
- Working jointly with clients' existing legal and tax advisers.

1st Floor, 2/10 Vineet Khand, (Above Bank of Maharashtra) Gomti Nagar, Lucknow- 226010
Tel.. +91-522-6052401, 6052402, Fax no.+91-522-4026940.

Email: customersupport@bfccapital.com, Web: www.bfccapital.com



Let your money grow with us...

The capacity utilization of a Wealth Manager will be as follows:

- 1. Marketing activities including moving into the market - 50%
- 2. Handling of portfolio including doing technical analysis - 20%
- 3. Administration of Unit - 20%
- 4. Business Development Strategy - 10%

Skills Required:

- Strong sales and convincing skills.
- Strong analytical and quantitative skills.
- Strong knowledge of financial asset.
- Strong interpersonal skills with the ability to build and deepen client relationships.
- Excellent written and verbal communication skills.
- Ability to lead the team with strong administrative skills.

3. **Job Country** –INDIA

4. **Job Location** –State – Uttar Pradesh

5. **City** –Lucknow

6. **Vacancy Type**-Full time

7. **Package**-Prevailing as per Industry Norms, and shall not be a barrier for Suitable Candidate.

8. **Experience** –3 years of relevant experience, however Freshers with expertise in Finance may also apply.

9. **Qualification** –MBA in Marketing /Finance/CFA/Any other Finance Specialization.



Let your money grow with us...

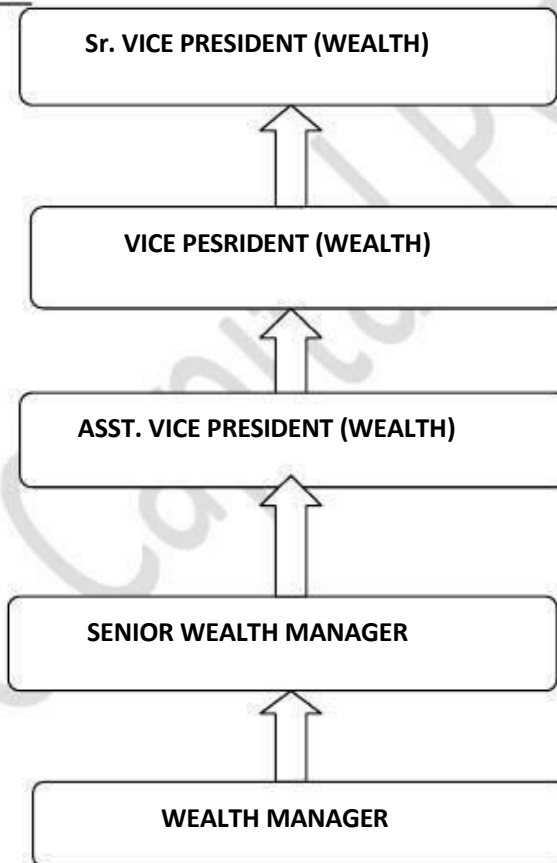
10. Performance Appraisal:

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.

11. Reporting:

The WM will report to his/her unit head usually Asst. Vice President- Wealth.

12. Career Growth





Let your money grow with us...

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

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

The Company provides fixed bonus at the end of completion of a year subject to fulfillment of certain conditions not related to sales performances.

1st Floor, 2/10 VineetKhand, (Above Bank of Maharashtra) Gomti Nagar, Lucknow- 226010
Tel.. +91-522-6052401, 6052402, Faxno.+91-522-4026940.

Email: customersupport@bfccapital.com, Web: www.bfccapital.com