



Senior Relationship Manager

Divine Financial Investment

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About Divine Financial Investment

Divine Financial Investment is a financial service provider, in the business of investment and wealth management. We are focused on bridging the gap between savings and investments and creating long term wealth for investors through a range of simple and relevant investment solutions. We provide various types of comprehensive financial services. The more your money works for you, the less you have to work for money. We make your money work harder for you.

Our range of financial planning and wealth management services is sophisticated yet simple to understand. We understand that wealth means more than just numbers and it reflects in the way we approach our relationships. An in-depth knowledge of today's financial world and sensitivity to future trends enable us to provide timely and impactful portfolio management services in India. Our experts have developed insights and experience in domestic and international markets to create innovative and adaptable solutions that suit the varied needs of our clients.

Position – Senior Relationship Manager:

Preface:

The SRM 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 Client Portfolio
2. Create Leads Pipeline
3. Arrange Participants for Events with the support of his Team
4. Acquire Clients from Leads provided by System
5. Stay Updated of Financial Market Events
6. Understand Financial Planning, Wealth Management, Tax Planning

Job Location –Lucknow, Uttar Pradesh

Vacancy Type – Full Time

Package – Rs. 2 L to 4 L per annum

Experience – Min Exp – 2 years + (Freshers may also apply if they possess required skill set)

Qualification – Graduate/MBA in Marketing / Finance

Job Detail –

The Senior Relationship Manager will be responsible for the promotion, development and handling of client relationships related to financial planning, wealth management, tax planning.

The capacity utilization of an SRM will be as follows:

1. Acquisition of new client by moving into the market – 60%
2. Handling of portfolio and create new references from the client -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.

