IIFL WEALTH

Role: Wealth Management – Senior Relationship Manager
Location: Mumbai, Delhi, Bangalore, Chennai and Kolkata

Company Profile:

We **started operations in 2008**, building a **strong advisory practice** as opposed to a commission-based model. By aligning our interests with our clients, we have earned the trust of more than ***13,000*** **families** and we advise them on more **than *USD 22 bn* of assets under advice**, **distribution and custody.** This makes IIFL Wealth & Asset Management India's largest private wealth management firm in terms of assets under advice (AuA).

We, at IIFL Wealth & Asset Management, always put people first. Our **employees own 25% of the company**, ensuring the mutual success of our clients and employees. We have been named the **Employer of Choice**, because of our work culture and ethics, which is why we have the **fastest growing Relationship Managers team in the industry**.

Headquartered in Mumbai, we have offices across the country in locations such as New Delhi, Bangalore, Chennai, Hyderabad, Kolkata, Pune, Goa, Ahmedabad, Baroda, Chandigarh, Jaipur, Ludhiana & Kanpur. **Internationally,** we are present in New York, Houston, London, Geneva, Mauritius, Dubai, Singapore & Hong Kong.

IIFLW has always endeavored to invest ahead of competition, in resources, be it human capital, infrastructure or technology. Keeping in mind the pace of technological evolution, coupled with the objective of delivering best in class products and services to its clients, IIFLW acquired in 2018, a boutique Bangalore based multifamily office, Altiore Advisors Pvt Ltd. Altiore brings to IIFLW an unique cloud based proprietary cloud based software platform that allows users to consolidate their investments across multiple asset classes, wealth managers and institutions under one roof and runs exhaustive analytics and hygiene checks with in house algorithms, amongst other things. Altiore also brings with it, a great team of techies and analysts and helps adopt for the first time an in house build approach to niche tech functions. IIFLW will continue to invest substantially to ensure it remains a step ahead in technology adoption and deliver cutting edge solutions to all its customers and stakeholders.

As a further testimony to our principles, approach and growth, we have been blessed by an extremely marquee set of investors (General Atlantic, Fairfax, HDFC Standard Life, Rimco, Stead view Capital, Ward Ferry) that would help us further in our journey to greater heights.

Job Role:

- The RM will work as an advisor to identify and develop new opportunities to deliver advice and solutions to existing clients, and acquire new Wealth Management prospects
- Identify customer needs and provide them with right financial planning assistance and asset allocation with the help of our Investment Advisory services
- Build and deepen relationships with existing HNI Customers to achieve increase in share of wallet
- Acquire New Clients for the firm and also develop new territories

- Be able to work with colleagues of other divisions of the bank to Cross Sell products and services to clients
- Adhere to all company processes and policies, and carry the IIFL brand through developed functional and behavioral skills
- Deliver Sales Targets
- An advisor need to expand existing client relationships, improve client satisfaction, strengthen client commitment, ensure client retention and grow revenue for IIFL Wealth Management while acquiring new clients as well

Job Requirements:

- Excellent written and oral communication skills
- Strong Organizational Skills
- Experience in investment/financial services & knowhow of capital markets knowledge
- Strong Teamwork and Collaboration
- Relationship Management & Interpersonal skills
- 10 plus years of experience with large investment books
- Post-graduate qualification would be preferred in Wealth/ Private Banking