EarnWealth
Kamate Raho

Job Description for Senior Relationship Manager/ Relationship Manager – Speed Wealth:

1) Find and Generate leads for various types of financial products like Investments, Insurance & Loans.
2) Fix up appointments with these prospects, make presentations, follow-up and close the deal.
3) Revenue writing & salary justification.
4) Advice financial products basis the need of the customer.
5) Customize financial plans according to clients' changing needs.
6) Build strong relationships to retain existing clients.
7) Maintain updated knowledge of regulations, practices, and financial products.
8) Provide financial reports and interpret financial information to client while recommending further courses of action.
9) Handle the portfolios and set up guidelines.
10) Learn the importance of the relationship between prospects, and clients.
11) Prepare MIS daily for leads generated & keep close tracking on the same to generate Revenue.