



## JOB DESCRIPTION | FINANCIAL PLANNING MANAGER

### KEY RESPONSIBILITIES & DUTIES

- Client centricity and empathy
- Creating Financial Plans for clients
- Managing clients' investment portfolios
- Conducting Risk Profiling tests to assess product suitability
- Evaluation of client goals and mapping of investments to goals
- Create a mix of right asset allocation based on clients' risk profiling
- Conducting periodic reviews of Portfolios
- Engaging and establishing strong relationships with clients and ensuring superior client experience
- Adhering to internal processes and guidelines to create value for clients

### ACADEMIC QUALIFICATIONS / DESIRED CANDIDATE PROFILE

- Post Graduate from a premier college
- Understanding of Financial Planning concepts
- CFP, Financial Planning course or related qualifications will be an added advantage
- Strong relationship management skills
- Process driven approach
- Excellent verbal and written communication skills
- High levels of energy and discipline

### PRIOR WORK EXPERIENCE

0-3 years