



JOB DESCRIPTION | RISK MANAGEMENT ADVISOR

KEY RESPONSIBILITIES & DUTIES

- Engaging with existing clients of FinEdge on the Personal Risk Management aspect of their Financial Plans
- Explaining the importance and criticality of achieving an adequate quantum of Financial Goal Protection (through Pure Term Life Insurance Products only)
- Tailor making a Goal Protection Solution for clients, after analyzing their goal deficits and future value at risk
- If required, helping clients with an assessment of their existing policies and effecting a 'clean up' of ineffectual/ deadweight plans that they may be holding
- Explaining the importance of having an adequate Medical Insurance coverage, and suggesting the most suitable solution to clients after evaluating their present situation
- Seamlessly assisting clients with the onboarding process for their Life Insurance/ Medical Insurance policies purchased through FinEdge
- Meticulously maintaining and updating Risk Management related data in the CRM
- Assist with claims and renewals of sourced policies, after analyzing the client's situation for any material changes

ACADEMIC QUALIFICATIONS / DESIRED CANDIDATE PROFILE

- Graduate or Post Graduate from a premier college
- Prior Work Experience in the Insurance Domain is not required
- Demonstrable interest in the risk management aspect of personal finance, desire to build out a long-term career in the domain
- Excellent verbal and written communication skills
- High levels of energy and discipline
- Basic working knowledge of Life Insurance and Health Insurance will be an added advantage

WORK EXPERIENCE

0 to 3 years

CTC ON OFFER

As per industry standards