



JOB DESCRIPTION | INVESTMENT MANAGER

At FinEdge, we measure our success by a singular parameter – the value that we create for our clients. Our biggest “wins” are happy clients. In sync with this core belief, the experience that you create for your clients will determine your long-term growth and success as an Investment Manager at FinEdge.

Job Responsibilities

- Responsible for end to end client management by following the financial planning process, living and embodying the company’s core values of client centricity and empathy
- Having fantastic, value creating & memorable conversations with clients every single day!
- Helping your clients achieve their financial dreams by identifying problems, co-working on solutions, and implementing and monitoring those solutions
- Being a mentor, guide, counsellor and friend to your clients on their challenging journey towards long term wealth creation
- Managing investment portfolios and making people ready to meet their financial goals by following the financial planning process
- Being an advisor and not a sales person
- Manage clients virtually from our office in Gurugram (no field visits / physical meetings outside office)

Skills & Qualifications

- Master’s Degree is required
- Excellent communication skills, ability to articulate thoughts and have meaningful conversations with people
- Above average grasp over both English & Hindi
- Desire to learn about how Financial Instruments can be ethically used to create long term value for investors
- Genuine desire to “help” people and make a difference to their financial lives
- Ability to multi task, be highly organized and follow organizational processes in a disciplined way
- Any added certifications in Financial Planning (such as CFP) will be an added advantage
- Post joining FinEdge, clearing the NISM series V A will be mandatory

Preferred Work Experience: 0-3 years

We are different in the way that we work; so, we prefer clean slates! We actively defy a lot of preconceived notions that people have about the financial services industry – that it is meant to be target centric, revenue driven, and the like. As an Investment Manager at FinEdge, the only target you’ll ever have is to have meaningful engagements with your clients. We attach more weightage to your mindset and your attitude, than to your work experience. Freshers are welcome.

CTC

Rs. 5.00 Lakhs per annum (Rs. 3.50 Lakhs Fixed + Rs 1.50 Lakhs Indicative Variable)

What’s this variable pay? – We are not a sales centric company, so clearly our variable pay is not based on sales targets. We believe the variable pay is an additional reward for following the path of being client centric. All the parameters for monthly variable pay are quantifiable by the efforts in managing your client base well, to be specific our variable parameters today are based on time spent interacting with clients, number of financial plans made / reviewed. The variable pay is calculated and paid out on a monthly basis.

Self-Assessment Quiz: Are you the right person for FinEdge?



-
- | | |
|---|--|
| <ul style="list-style-type: none">• You enjoy the warm glow of helping people• You feel validated through the respect that you win• You are warm and empathetic• You believe that managing money (and dreams) is a huge responsibility• You have high Emotional Intelligence• You like working in a “collaborative” environment• You love interacting with people• You prefer an in-office job | <ul style="list-style-type: none">• You need to be driven by sales targets• You feel validated through revenue-based performance only• You are self-centred and your interests come first• You believe that managing money is all about generating commissions• You prefer working with data rather than people• You are impatient and restless• Your overall awareness levels are low• You prefer field work |
|---|--|
-