



Job Description | Associate Manager – Business Development

FinEdge Advisory Private Limited | www.finedge.in | careers@finedge.in

Job title: Associate Manager – Business Development

Reporting to: Cluster Head/ AVP

Salary: Rs. 3.36 Lakhs per Annum (Fixed: Rs. 2.16 Lakhs, Performance Linked Variables: Rs. 1.20 Lakhs)

Hours: 9:30 AM to 6:30 PM, Monday to Saturday (1st & 3rd Saturdays off)

Location: Gurgaon (this is not a field job)

Purpose of the position

The Business Development Manager (BDM) plays a critical role by engaging with persons interested in Goal Based Financial Planning. The BDM acts as a first-level touchpoint for all leads received from FinEdge's partner AMC's (Asset Management Companies), and hence effectively acts as the 'face of the organization'. By leveraging upon superior knowledge of personal finance concepts, outstanding communication skills and discipline, the BDM constantly acquires key client relationships, thereby helping develop the company's client base and playing a vital role in the long-term growth of the business. Alongside, the BDM also functions as an expert in the field of personal risk products and advises existing clients of FinEdge on the same.

Key Responsibilities & duties

- Engaging with persons interested in Financial Planning & Mutual Funds
- Acting as the face of the company by clearly describing the FinEdge value proposition to prospective clients
- Clearly explaining benefits of Mutual Fund investing vis-à-vis other alternatives
- Conducting Risk Profiling tests to assess product suitability
- Cursory evaluation of client goals and mapping of investments to goals
- Presenting and executing asset allocation-based investments for lump sums
- Seamlessly onboarding clients and ensuring a smooth and hassle-free initial experience
- Advising existing clients of FinEdge on personal risk products such as health insurance, term insurance and motor insurance

Academic qualifications / Desired candidate profile

- Graduate from a premier college in any discipline
- "Work in progress" CFP or related qualifications will be an added advantage
- Demonstrable interest in 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 financial instruments will be an advantage

Work experience & skills

Since this is a fresher position, no prior work experience is required. However, successful internships at reputed institutions or part-time work experience with any organization would be an advantage