**Vacancy for Relationship Manager at Glory Prime Wealth Private Limited**

**About Glory Prime Wealth Private Limited:** The company is engaged in financial planning for clients across various investment products - Mutual funds, PMS, Insurance, Fixed Deposits, etc and various insurance products – Life, Health, General insurance.

Vacancies – 2

Location – Ravet, Pune

**Key Roles and Responsibilities:**

1. Attending to Investors and prospect clients for product queries, portfolio discussion, regular updates and other service requests.
2. Managing stakeholders such as clients, relationship managers across investments and insurance industry, vendors, etc.
3. Execution of investment transactions (financial and non-financial) and assisting clients in planning the right insurance product.
4. Analysing customer’s investment approach through previous portfolio trend, risk profile, customer profile and regularly interacting with them.
5. Processing of set-up for all types of clients (individual, partnership firm, company, etc) and following up to closure.

**Preferred Skills:**

1. Knowledge of Mutual Funds, Insurance, Financial products, etc.
2. Excellent Communication Skills: Active listening, Effective Speaking and Writing.
3. Proficient in MS office.
4. Intent to Learn, problem solving approach and willingness to stay for longer tenure.
5. Candidate having experience in Wealth Management industry is preferred (though not compulsory)

**Academic Experience:**

1. Minimum – Post Graduation.
2. Preferred – CFA Level 1.

**Note:** Candidates staying/willing to re-locate in Pimpri-Chinchwad/Wakad/Pimple Saudagar, etc nearby areas are preferred. Glory Prime Wealth Private Limited office is located in Ravet.

Interested candidates can send CV on [navin@gpwpl.com](mailto:navin@gpwpl.com).

Regards,

CA Navin Agarwal, CFA (Founder & CEO)