

Position: Assistant Manager – Investment Planning & Operations

Type :	Full Time
Location :	Bangalore
No. of Positions :	2
Qualification :	B.Com / Graduate / CFP
Experience :	1 to 2 years' experience in Plan Servicing and Operations.
Salary Expectation :	As per industry standards. Will be based on individual qualifications, experience and competence.



Job Description:

- Responsible for execution of investment suggestions.
- On time and efficient execution of Investments, Insurance Plans etc.
- Client coordination for completing all KYC compliant documentation and other documentation.
- Responsible for completing all paperwork towards Financial Plan implementation.
- To coordinate with vendors / product manufacturer to execute and resolve service related queries – across all investments i.e. brokers, mutual funds, insurance, other vendors etc.
- To ensure investment recommendations and insurance plans are executed with 100% accuracy and zero error.
- Regular and accurate investment updates, tax reports etc to send to clients.
- Regular internal audit checks on all client information and reports.
- Regular focussed plan updation and monitoring as per client goals and plans



Skills that are absolutely necessary for the job :

- Preferred - CFP graduate
- Good knowledge in Excel and Maths with error free work.
- Must have basic knowledge of Financial Products and Investments such as MFs, PMS, Bonds, AIF, Corporate FDs, PPF, EPF etc).
- Good operational, organisational and follow up skills
- Strong leadership, interpersonal, analytical, and time management skills
- Good communication skills (listening, writing and speaking)
- High level of Integrity, Ethics