Position: Assistant Vice President – Planning & Advisory

Type :	Full Time
Location :	Bangalore
No. of Positions :	1
Qualification :	CFP / NISM X-A / X-B / PG Degree in Finance
Experience :	3 to 5 years
Salary Expectation :	In line with Industry (depends on the experience and 'fit' for the role. There is no real upper limit on salary for the right experience.)

Job Description:

- Preparation and checking of customized financial plans, monitoring of plans, updating plans with utmost importance and attention to details and understanding the product.
- Coordinating with junior planners on scenario analysis and case studies specific to client needs.
- Coordinating with all the service providers of financial products for availability, comparison, analysis and finalizing of products.
- Contacting clients and setting up meetings, accompanying the advisory team for meetings and review.
- Review of financial plan with the advisory team.
- Risk profiling of existing and new clients and meeting them on one to one basis to understand and address their requirements.
- Client portfolio reviews and recommendations.
- Overseeing and maintaining records of clients handled with review and portfolio checks.
- Understanding of markets, market updates and news affecting our industry.
- Coordination with investment advisors and client servicing teams with respect to implementation of plans where applicable and hand holding the client in questions relating to implementing the plan.
- Research on new financial planning trends and data insights linked to financial plans. Must be able to articulate the same in an article format to publish on our website.
- Sound understanding of investment products across asset classes.
- Sound understanding of Wealth Management and asset allocation concepts.
- Aid in queries linked to clients' financial plan and investment recommendations.
- Maintenance of planning and review calendars for clients.
- Compliance for clients.
- Detailed research on multiple financial products.

- Regular meetings with Asset, Fund, Portfolio and Relationship Managers to get their view on financial markets and products.
- Analysing and sharing macro views on global and local economy and financial markets. Sharing investment related research, articles, blogs and updates with investment advisors and teams on an ongoing basis.

Must Have:

- Very good English written and oral skills.
- Advanced Excel skills and Powe Point Skills.
- Excellent track record, people who've worked for professional corporations.
- Two references from past workplaces.
- At least 3 - 5 years of experience.