

ICICI Bank

Job Title: Wealth Manager

Business Group: Wealth Management Group

Grade range: DMII

Job Purpose:

Monitor and address **HNI clients' banking and Investment requirements**, use financial acumen and investment expertise to review a client's personal data, align clients' need through superior service, seamlessly align service delivery for enhanced experience; thereby helping the client to reach his short term and long term investment goals.

Key Deliverables

The objective of this job is to increase overall financial revenue being generated from the set of HNI accounts mapped with asset and liability targets by means of:

- Main deliverables are building and maintaining long term relationships, deepening relationship (growing relationship value) and growing revenues
- By reaching out to all mapped clients on a periodic basis (defined) and cross selling as many products as possible (as per the demographic, lifestyle and risk profiling)
- By providing seamless and superior service delivery
- By ensuring compliance with key regulatory and bank level requirements

Responsibilities

Primary Responsibilities

1. Focus on business development across liabilities, assets & fee to sustain and achieve growth in relationship value, revenues & improved client stickiness
2. Achievement of product-wise targets
3. Formulate outbound and inbound sales plan to acquire new HNI customers for increasing customer base of the portfolio.
4. Ensuring regular availability of Research material and inputs to the client
5. Conduct risk profiling of all mapped clients for better advisory on investment needs
6. Ensuring client contactability at all times through updation of latest contact details in all necessary systems
7. Regular contact with all mapped clients through weekly / monthly calls
8. Resolution of queries of all mapped clients within TAT specified
9. Ensure compliance through regular process checks and self-audit scores

Other Responsibilities

1. Ensuring regular updation of call reports in relevant system
2. Ensuring need based product approach towards clients and regular reporting of product penetration.
3. Mandatory certifications
4. Managing relationships to improve relationship value of existing customers

Location: Chennai

Contact Person

Candidates who are interested can send their CV to venkatesh.ganapathy@icicibank.com with subject line as "**RM Wealth**"