

## About Sahayak Associates

Sahayak Associates is a Wealth Management firm that offers a complete range of solutions to help build, manage and preserve wealth for its clients by executing strategies that maximizes growth and optimizes risk.

At Sahayak, we are determined to offer a seamless customer experience that maintains the highest standards of confidentiality and keeps the interest and financial goals of our customer in mind.

Sahayak Associates comprises a team of experienced Finance Professionals and is one of the fastest growing Wealth Management firm in the region handling more than 500 clients at present.

## Job Title: Customer Relations Executive - Investments

### Job Responsibilities

- Provide prompt, accurate, and friendly customer service. This will include responding to inquiries regarding Financial Planning, investment options, documentation, assisting with transfers, goal mapping and performance review against client goals.
- Prospect for new business through various channels and follow up with warm leads.
- Use a customer-focused, needs-based process to educate customers about investment options
- Hold internal and client facing status meetings, and updates that report on performance, issues, and continuous improvement
- Create and maintain comprehensive project and client documentation
- Plan and facilitate client-planning sessions to ensure all contractual obligations are met and performance of client's portfolio is on par with expectations
- Build strong working relationships with clients, stakeholders, and team members through effective communication throughout the client life cycle

### Job Requirements

- Minimum College degree with 2-3 years of experience within the financial management industry: equity, investments, insurance etc.
- Have a good understanding of core business concepts and certification courses in investment and financial markets.
- Must be a Self-starter with a passionate, positive and enthusiastic attitude.
- Excellent communication, presenting and reporting skills in English language desired
- Expertise in Microsoft Office products especially Microsoft Excel
- Have access to a laptop, personal conveyance and smartphone for work purposes
- Is willing to work and travel according to the client schedules/ routines.

### Additional Information

- Fixed salary/incentive based pay. Looking for someone who is willing to put in extra hours at work to deliver value
- This position does not have standard working hours as timings might change vary based upon client needs

For more information, please call/email us at:

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Mr. Sahayak