Recruitment Drive by BUILDING BLOCKS GROUP - Hyderabad

Job Description

While the day-to-day duties of wealth managers are determined by their employer and the needs of their clients, there are many core tasks associated with this role. Based on our analysis of job listings, these include:

Analyze Financial Information
Hold in-depth consultations with clients to learn about their financial goals, risk tolerance, and current asset allocation. Also analyze existing securities and portfolios and supplement their findings with research about possible investments.

Cultivate Client Relationships
Throughout the whole process, interact directly with clients and take charge of setting meeting agendas, presenting plans and reviews, giving regular updates, and addressing inquiries. Ideally, work with client's long term and possess a track record of completing tasks on time and resolving issues right away.

Develop Strategies
The main deliverable is a comprehensive strategy that takes into account all aspects of the client's finances. Depending on the client's requirements, this takes the form of financial plans and portfolios that encompass asset allocation, investments, estates, and taxes, with the aim of increasing overall wealth.

Manage Assets
Once the client agrees with their recommendations, move on to implementation by managing assets and setting up investments. Then monitor these on a regular basis to review performance and make adjustments accordingly.

Requirement

- **Good communication skills**
- **Knowledge of finance**
- **Analytical thinking**
- **Relationship management**
- **Adaptability**

CTC: 3L PA
Designation: Wealth Manager

Thanks & Regards

Mr. Jeevesh Rao
Human Resource
Building Blocks Group

BUILDING BLOCKS GROUP
EXPERTS IN LAND INVESTMENT
YOUR TRUE WEALTH