PRiS
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Relationship Manager - HNI **JOB DESCRIPTION**

Job Profile

A HNI Relationship Manager at PRiS will develop and interact with the key client group of the company, while applying financial and business acumen to address the specific requirements of this segment of our clientele. You will be entrusted with responsibility across all aspects of the client interface including lead-generation, marketing collateral creation, sharing of key research information, client reporting, query handling and meetings. You will be dedicated to a maximum of 3 HNI Clients at a time. The opportunity for personal growth and career-building would be immense.

Key Responsibilities

- Maintain cordial relationship and service the specific requirements of designated HNI Client accounts
- Stay abreast of industry trends, breaking news and PRiS' research of companies subscribed to by clients
- Generate leads and call on designated client referrals for broadening prospect list & new client acquisition
- Issue solicited advisory timely to HNI clients based on the PRiS research reports and investment strategy
- Assimilate and present key client requirements to PRiS Management for investment research development
- Review industry trade journals to build domain knowledge, understand trends and competitive landscape
- Generate monthly reports for designated HNI accounts to track the performance of any issued advisory
- Screen clients with special advisory needs such as those owning complex, multi-asset class portfolios
- Respond to all queries to client's satisfaction and avail feedback on services rendered at regular intervals

Skills Required / Desired

- Possess a pleasing personality, with excellent communication and interaction skills
- Adept at grasping of financial data, research reports and relevant industry / marketing collaterals
- Skilled in key-client management, portfolio performance evaluation, analysis and presentation
- Must have a fundamental understanding of the various investment asset classes
- Good knowledge of MS Office (Excel, Word and PowerPoint)

Relationship Manager must be conversant with the set of equity/debt instruments subscribed to by the designated HNI clients; must be a good listener & reader; must respond promptly to breaking news developments on designated companies to provide information-edge to HNI clients; must be collaborative, willing to take guidance from research team and share market insights. Candidate should be flexible enough to adapt his/her approach to meet the specific service requests of the client in their desired format and schedule.

Minimum Qualification: Graduate in any discipline with a minimum of 60% marks (or equivalent CGPA). Finance / Marketing background, MBA/PGDM preferred.

Work Experience: 1 year – 3 years (Financial Services domain experience preferred)

Work Timings: Monday-Friday: 9:00 am till 6:30 pm IST
Saturday: 10 am till 3 pm IST