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Seguro – Wealth Manager – Sales Jobs In Sharjah | SEGURO

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Company: SEGURO

Location: sharjah

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Responsible for acquiring preferred clients (HNI / Ultra HNI).

Maintaining client relationships and generate AUM from preferred clients.

Advising HNI / Ultra HNI clients on their Investments and managing their overall financial portfolio and deepening the wallet from existing clients

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Responsibilities

Track the HNI / Ultra HNI segment in the market for new client acquisition.

To research, investigate and update themselves on available investment opportunities / financial market trend to determine whether they fit into clients portfolios.

Use financial acumen and investment expertise to review a client's personal data, align client's 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.

Achievement of product-wise targets.

Formulate outbound and inbound sales plan to acquire new HNI customers for increasing customer base of the portfolio.

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Requirement

Formulate outbound and inbound sales plan to acquire new HNI customers for increasing customer base of the portfolio.

Conduct risk profiling of all mapped clients for better advisory on investment needs.

Regular contact with all mapped clients through weekly / monthly calls – Resolution of queries of all mapped clients within TAT specified.

Ensuring need based product approach towards clients and regular reporting of product penetration.

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