

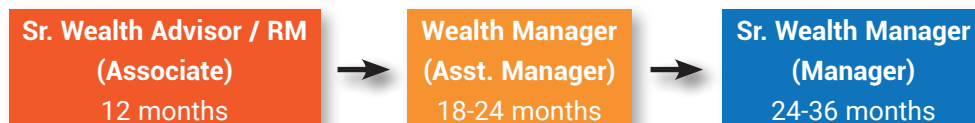
Role Details

- Managing Client Relationships
- Portfolio Analysis & Building Aum
- Acquiring Clients

KEY RESPONSIBILITIES:

- **Advising Affluent & HNI clients** on their Investments across a gamut of wealth products and managing their overall financial portfolio. Deepening the wallet from existing clients
- **Manage client portfolios**, keeping client plans up-to-date. Analyze client portfolios and make necessary suggestions. This includes comprehensive financial planning and asset allocation and accordingly advising clients on investment products and services across asset classes
- Seek to **establish a level of trust and confidence** with the client so that any financial need can be addressed, and solutions offered.
- **Procuring potential/target clients** through networking, database, market analysis and references.
- **Achieving financial goals** and maintaining organization brand value.
- Ensure **highest levels of customer service** and experience to these HNI customers.
- Interact with clients to **update them on research calls and advising on asset allocation** within their financial portfolio and guide them on their investments

Career Growth at Edelweiss Wealth Management



ITM Skills Academy

ITM Skills Academy D/222, ITM College-IHM, Near Bafna Motors, LP Road, Nerul, Navi Mumbai – 400 706.
Tel: +91 22 4914 4247 Web: www.itm.edu/ISA/edelweiss/

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Post Graduate Program in Financial Services (PGPFS) *with specialization in* **Wealth Management**



ITM **Skills** Academy

in association with



About ITM Skills Academy

ITM Skills Academy (ISA), founded in 2013 with path-breaking partnership with ICICI Bank to train their front-line sales officers and since then ISA has witness tremendous growth, ISA is working on a unique Source - Train - Deploy model wherein ISA provides skilled resources to its partners by hiring - training - deploying the candidate strictly as per the specs required by the partner, ISA focusses on Imparting competency based learning to the candidate with defined outcome, it aims to churn trained job ready candidates for its partners.

Since its Inception, ITM Skills Academy is actively working as Industry linked Recruitment &

Training Partner which has successfully sourced and trained over 30000+ candidates who are working with our various clients. ITM Skills Academy is also a NSDC accredited training partner.

Our Skills Academy is currently operational in Mumbai, Vadodara, Raipur, Warangal, Bengaluru, Chennai, Warangal & Noida with fully residential installed capacity to train 1500 candidates on a monthly basis. We are working for our various clients like ICICI Bank, HDFC Bank, Kotak Mahindra Bank, Titan Eye, Raymond Retail, ING now Kotak, Religare Finvest, Aditya Birla Financial Services, DHFL, Yes Bank, Bajaj Capital, Kotak Securities to name a few.

About Edelweiss

Edelweiss is one of India's leading financial services conglomerates, offering a robust platform, to a diversified client base across domestic and global geographies.

Our continuous and single-minded focus is on understanding customers' needs and offering the right financial solutions. Being present in every financial life stage of a customer, helping them create, grow and protect their wealth, are our key lines of business.

The group has sizeable presence in large retail segment through its businesses such as Life Insurance, Housing Finance, Mutual Fund and Retail Financial Markets. It has an asset base of Rs. 53900 Cr, over 11,000 employees across its 475+ offices in India and abroad. Catering to over 1,200,000+ clients under various businesses in retail and wholesale segments.

About Edelweiss Wealth Management

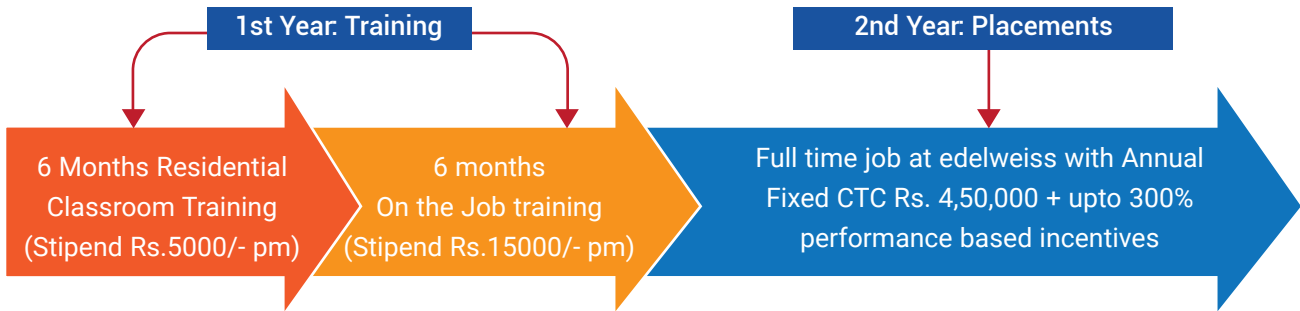
Edelweiss Wealth Management is dedicated to building long term relationships with clients and empowering them to gain from market opportunities. Our highly customised approach to creating wealth for our clients is supported by a robust and cost-effective business model focused on improved transparency and compliance, synergistic partnerships and efficient technology solutions. We offer a differentiated value proposition to our customers, which is delivered

through specialists financial advisors as well as through a digital platform.

The firm's culture promotes entrepreneurial and results-driven approach while teamwork and intellectual rigour are an integral part of one's performance. We encourage members to display higher levels of initiative, hunger for learning, be self-driven and taking on additional responsibility.

POST GRADUATE PROGRAM IN FINANCIAL SERVICES

The Next Generation Career Track: Specialized Training + Placement



Return on Investment: Candidate earns Rs.1.2 lac as Stipend during the program

Program Description

Post Graduate Program in Financial Services is an endeavour by ITM Skills Academy in association with Edelweiss to nurture industry leaders of the future by imparting domain expertise and skill set in the field of Wealth Management. The Program focuses on balanced approach of providing inputs of relevant knowledge, developing skills and shaping required behaviours.

Program Features

- Designation: Associate
- Job Location – PAN India
- Bi - annual Performance Based Appraisal
- Quarterly Paid Incentives
- Training Location: Mumbai

Eligibility

- Qualification: All Graduates (Including Engineers and MBA)
- Age: Min 20 years Max 28 years
- Experience: 0 to 2 years

Duration

- 1st year (6 month classroom training + 6 month on the Job training with Edelweiss)
- 2nd year (Employment with Edelweiss)

Investment

- Rs. 3,25,000/- (Inclusive of all applicable taxes)

Return on Investment

- 20% fee back after 1st year (After DOJ)
- 80% fee back after 2nd year (After DOJ)

Selection Process

