



## Job Description - Operations Executive

**Job Summary:** We are looking for a highly motivated candidate with strong execution and communication skills to join our team. The candidate will report to the Operations Manager and be an integral part of the organisation. This is a role that has a huge scope for growth in a lot of different verticals. The right candidate can move on-to senior positions across different verticals.

**About The Company:** We are a leading financial planning firm based out of Noida, India, managing over 300 Crores in assets for more than 2000 clients across India and globally. We pride ourselves on delivering end-to-end financial planning solutions tailored to our clients' needs. Please visit our website for more details - [Sanjay Mehta Financial Services | Financial Planner Noida – Towards a Secure Future \(www.smfs.in\)](http://www.smfs.in)

### **Role Details:**

- **Salary:** 2.5-3 Lakhs. Negotiable based on skill set and experience.
- **Location:** Sector 132, Noida
- **Joining Date:** Immediately.

### **Key Responsibilities:**

- Manage end-to-end back-end operations and related activities.
- Dedicate yourself to tasks with an attention to detail.
- Follow Standard Operating Procedures (SOPs) for data entry and operations across different products and services, including mutual funds, PMS, corporate FDs, bonds, health insurance, car insurance, and life insurance.
- Ensure data hygiene and organization.
- Continuously refine client acquisition and other operational processes to improve efficiency and customer experience.
- Perform fieldwork, visiting clients to complete documentation and onboarding procedures.
- Support the existing operations team to ensure seamless completion of assignments.
- Fulfil all company-established policy obligations.

### **Qualifications & Requirements:**

- **Education:** Graduate in any domain
- **Experience:** **0 - 2 years**. Extra points for experience in the Financial Services sector.
- **Traits:** Extremely motivated, energetic, persuasive, patient, and hard-working; Good Communication Skills both written & oral. Attention to detail
- Candidate will be visiting clients so **must be ready for field work**, sometimes at odd hours as well. Should know how to ride a 2-wheeler and have a valid driving license.

- Strong organizational and multitasking abilities.
- Ability to work independently and as part of a team.
- Knowledge of financial products, services, and industry regulations.
- Proficiency in MS Office and CRM software.

#### **Benefits & What We Offer:**

- Competitive salary and performance-based bonuses.
- Comprehensive health insurance and term cover benefits.
- Opportunity to work closely with top leadership and gain valuable industry and business insights.
- Professional development and career growth opportunities.
- A supportive and collaborative work environment.
- Regular in-house and outsourced training sessions.

#### **How to Apply:**

- Mail cover letter and resume to *careers@smfs.in* with the subject **“Application for Operations Executive – Your Name”**
- **If you are applying, please read in detail about – the company, the industry and the key responsibilities of your specific role and be ready for a quick interview**

Join Sanjay Mehta Financial Services Private Limited and help us lead our clients towards a secure financial future!