



## Job Description – Relationship Manager

**Job Summary:** We are looking for a dedicated and dynamic Relationship Manager to join our team. The Relationship Manager will serve as the client's single point of contact for any requirements, assist the Financial Planner in all meetings, implement any changes, and develop and maintain strong relationships with clients. The ideal candidate will regularly communicate with clients to provide exceptional service and generate additional business through upselling and referrals. This is a role that has a huge scope for growth. The right candidate can move on-to senior management positions.

**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:** 3-6 Lakhs. Negotiable based on skill set and experience.
- **Location:** Sector 132, Noida
- **Joining Date:** Immediately.

### **Key Responsibilities:**

- Serve as the primary point of contact for clients, addressing their needs and requirements promptly and professionally.
- Assist the Financial Planner in client meetings, providing support in preparing and presenting financial plans.
- Implement any changes or updates to clients' financial plans as directed by the Financial Planner.
- Develop and maintain strong relationships with clients, ensuring their satisfaction and loyalty.
- Regularly call and check in with clients to provide ongoing service and support.
- Identify opportunities to generate additional business from existing clients through upselling and referrals.
- Coordinate with other team members to ensure seamless service delivery to clients.
- Maintain accurate and up-to-date client records and documentation.
- Stay informed about the latest financial products, services, and industry trends to provide clients with relevant and timely advice.

### **Qualifications & Requirements:**

- **Education:** Graduate in any domain (Business/Finance preferred)
- **Experience:** Ideally 1-3 Years of proven experience in a client-facing role, preferably in the financial services industry.
- **Traits:** Extremely motivated, energetic, persuasive, patient, and hard-working; Excellent Communication Skills both written & oral.
- 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](mailto:careers@smfs.in) with the subject **“Application for Relationship Manager – 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!