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Kotak Mahindra Bank Careers For Freshers – Financial Planner/Job Change

Hiring organization
Kotak Mahindra Bank

Job Location

India
Remote work from: IND

Date posted
February 24, 2024

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Valid through
31.08.2024

Base Salary

USD 15 - USD 29

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Qualifications

Graduate

Employment Type

Full-time

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Description

Kotak Mahindra Bank Careers For Freshers

As a Financial Planner at Kotak Mahindra Bank, you'll play a pivotal role in helping individuals and families navigate the complexities of their financial lives. You'll work closely with clients to understand their unique goals, aspirations, and risk tolerance. By leveraging your financial expertise and analytical skills, you'll develop personalized financial plans that optimize their financial well-being and pave the way for a secure future.

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Kotak Mahindra Bank Jobs Near Me

Responsibilities:

- Conduct in-depth client consultations to assess financial needs, risk tolerance, and investment goals.
- Develop comprehensive financial plans encompassing wealth creation, asset allocation, risk management, tax planning, and retirement planning.
- Recommend and implement suitable financial products and services aligned with client objectives and market conditions.
- Regularly review and update client portfolios, providing ongoing guidance and adjustments as needed.
- Build strong relationships with clients, fostering trust and confidence through clear communication and personalized service.
- Achieve assigned sales targets and contribute to the overall growth of the bank's wealth management business.

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Infosys Careers

Skills:

- Strong analytical and problem-solving skills.
- Excellent communication and interpersonal skills, with the ability to build rapport and explain complex financial concepts in a clear and concise manner.
- Proven ability to manage time effectively and meet deadlines.
- Deep understanding of financial products and services, including investments, insurance, and taxation.
- Proficient in financial modeling and analysis tools.
- Commitment to ethical conduct and regulatory compliance.

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