OPPORTUNE WEALTH ADVISORS PRIVATE LIMITED

JOB PROFILE:

- **Job Title: Sales and Client Relations Executive (Full Time Role)**
- About the company: Opportune Wealth is an upcoming Investment advisory firm and mutualfund distributor.

JOB DESCRIPTION:

- **On Sales Function –** Sales pitch to prospect clients on taking investment advisory services of Opportune Wealth Advisors.
- Coming up with creative ways to target a new set of customers, audiences.
- Searching for customer lists, cold calling new clients and setting up meetings.
- Following up and tracking leads generated by self or Directors, to convert into clients of Opportune Wealth.
- **On client relations and support function –** Working closely with Research Team to communicate latest research to clients and prospect clients.
- Sharing the research with clients in quarterly call. Clear understanding of markets to explain portfolio performance from fundamental perspective. No short-term trading mindset.
- Writing Notes for prospect meetings and quarterly client calls after every meeting.
- Good written and oral communication skills and ability to take client and prospect meetings. of portfolio and research companies, monthly newsletters for clients.
- Creating Power point presentations for pitching services to clients and corporates. Helping with presentations of research team for seminars, webinars.
- Comfortable with ambiguity in tasks, and finding your own direction.
- Ability to work independently with limited guidance or day-to-day oversight.
- Attitude of continuous learning and upgradation.
- Ability to work in a high-pressure environment. Strong ethics and integrity.

Minimum Experience Requirements:

- 2-4 Years in sales team of advisory firm / investment firm/ broking firm
- Bachelors Degree in Economics, or Finance, or Commerce, or Accounts compulsory
- Post-Graduate degree in financial management/ equity markets helpful, not mandatory
- NISM Exam cleared in Mutual Fund Research, beneficial and advised

Office Timings: Monday to Friday (8:00 AM to 6:00 PM) –Saturdays and Sundays for client follow ups will be required.

Office Location @ COLABA, MUMBAI
Interested Candidates should fill out this google form -- https://forms.gle/io32y8nEJDXGdDs18
And also email: opportunewealth@gmail.com

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ABOUT US:

Opportune Wealth Advisors Private Limited offers a complete range of wealth management solutions including financial planning, direct equity investments and mutual fund investments.

Our aim is to help our clients grow and preserve their wealth, in a manner that helps them achieve their financial goals. We help clients allocate their capital in a way that will ensure long term appreciation of wealth and purchasing power over time.

While advising on equity investments, we conduct fundamental research to find quality companies, whose value per share we hope will appreciate manifold over the next 10 years to 20 and 30 years.

For more information visit our website: https://opportunewealth.com/