



**ANYTIME  
INVEST**  
निवेश आपका , भरोसा हमारा

**ANYTIMEINVEST Services Pvt. Ltd.**

GSTIN : 07AASCA6588J1ZU

CIN : U74140DL2019PTC354248

## SKILLED HELPERS WELCOME !

### JOB DESCRIPTION | INVESTMENT MANAGER

At Anytime Invest, we measure our success by a singular parameter- the value that we create for our clients. Our biggest "wins" are happy clients. In sync with this core belief, the experience that you create for your clients will determine your long-term growth and success as an Investment Manager at Anytime Invest.

#### Role & Responsibilities

- \* Being the face of Anytime Invest in front of clients by living and embodying the company's core values of client centricity and empathy.
- \* Having fantastic, value creating & memorable conversations with clients every single day!
- \* Helping your clients achieve their financial dreams by identifying problems, co-working on solutions, and implementing and monitoring those solutions.
- \* Managing investment portfolios and making people ready to meet their financial goals by following the financial planning process.
- \* Generate leads and act as a productive resource by meeting targets thereby ensuring the fulfillment of budgetary expectations of the organization.
- \* Would be responsible for relationship Building & Management with the customer for sale & services of financial products of Anytime Invest.[ Eg. Online Trading Account, Life Insurance, Mutual Funds, Investment Advisory, Wealth Management]
- \* Identify & recruit right quality partners to build a strong partner base.
- \* Provide training on products, business processes and selling techniques continuously.
- \* Provide assistance to partners in lead generation, prospecting and business development ensure that partners provide right financial solutions to customers as per need analysis and they adhere to required business processes and norms achieve the business target each month for generating new business and partner recruitment.
- \* Ensure that the selling through team of partners is aligned to all business quality metrics.
- \* Be the first point of contact for the customer to authenticate to concerns raised and validate with authorities.
- \* Exercise due diligence at first level to prevent unauthorized / fraudulent transactions candidates who are willing to be mobile to be mobile and work across locations will be preferred.

#### Desired Candidate Profile

- \* Master's Degree is required.
- \* Clear Interest in Financial Planning/ Investment Advisory as a career path.
- \* Excellent communication skills,ability to articulate thoughts and have meaningful conversations with people.
- \* Above average grasp over both English & Hindi.
- \* Desire to learn about how Financial Instruments can be ethically used to create long term value for investors .
- \* Genuine desire to "Help" people and make a difference to their financial lives.
- \* Ability to multi task, be highly organized and follow organizational processes in a disciplined way.
- \* Any added certifications in financial planning (such as CFP) will be an added advantage.

#### Preferred Work Experience

- \* 1-3 years, We are different in the way we work; so, we prefer clean slates!
- \* We actively defy a lot of preconceived notions that people have about the financial services industry- that it is meant to be target centric, revenue driven, and the like. As an Investment Manager at Anytime Invest.

#### Perks and Benefits

Salary + Lucrative Incentive

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