Job Profile for Team Lead, Wealth Management

To coordinate a team and serve as the primary relationship manager for high net worth and affluent clients, while seeing to the execution of the company's strategic and operational goals.

Role Qualification:

Academic/Professional: BSC Qualification (Minimum 2:2), Additional Professional Qualification is an advantage - CFA, ACCA, ACA, Chartered Wealth Manager, LLB

Work Experience: Relationship Management Experience Minimum of 2 years within the Financial Services Industry particularly in Private banking, Wealth Management, Business Strategy / Consulting.

Skills and Competencies:

- Confidence, Excellent communication, Interpersonal and listening skills.
- Good Knowledge of Investment and Insurance Products.
- Capability to understand and explain complex information simply and clearly.
- Ability to network and establish relationships with clients.
- Research and analytical skills.
- Negotiation and influencing skills as well as determination and tenacity.
- Ability to work in a team.
- Proactive Nature.
- Time management Skills.
- Customer service skills and Solutions driven mind-set.
- Self -motivation and organization.
- Good level of numeracy and IT Skills
- Target-driven mindset.
- Discretion and an understanding of the need for client confidentiality

Key Responsibilities:

- Act as Financial Adviser/ Relationship Manager to HNI Clients.
- Act as Team Lead / Back Up to Unit Head.
- Supervise and closely monitor the activities of team members with the support of the Unit Head.
- Markets and sells AXA MANSARD products and services to High Networth Individuals (HNIs).
- Ensure the development of an active prospect list as well as sign on of HNIs to AXA Mansard
- Cross-sells and Up-sells additional products and services to existing customers
- Supports the team in identifying and closing investment and insurance opportunities in all aspects of the customers' lives e.g. business insurance products for HIPs and HNIs who are business owners
- Ensure all customer data and transactions history is complete, and up to date on all platforms
- Participates in product development, repackaging and customization as it relates to the team's target market
- Provides market intelligence for product improvement/development to relevant teams in the company
- Support in planning and executing events targeted towards High Income Persons (HIPs) and High Networth Individuals (HNIs)
- Effectively identifies and analyses the financial needs of clients
- Responsible for the preparation of proposals

- Processes transactions for sales made and liaises with operations teams to ensure turn-around-times for the unit are maintained
- Prepares weekly, monthly and quarterly activities reports.
- Carry out any other assignment that might be delegated by the Unit Head

Interested Applicants should send their CVs to **jobtalentrecruit@gmail.com** stating the role applied for as subject of mail. e.g “Team Lead AXA Wealth”