



KESARI FINANCIAL SERVICES

“YOUR PARTNER FOR A BETTER TOMORROW”

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Kesari Financial

Services

Role: Client Service Manager

Job Profile

Dynamic Individuals who will be a single point of contact for all operational and from client servicing perspectives. A CSM shall service all our clients for online transactions and paperwork to do Investments, Loans, Real Estate Transactions, Insurance or any other financial transactions and services offered by us. The CSM will help our clients to better understand the full potential of our recommended Products & Services.

The CSM shall also interact with various channel partner from Mutual Fund Industry, Real Estate, Banking Industry, Loan Industry etc. to gather data and execute the transactions, to smoothen the processes. CSM will also be responsible for collaborating with different work in India and internationally to improve customer support programs and enhance customer satisfaction.

A CSM will be responsible for successful implementation, research, regular updates, Market Intelligence study, maintaining all the paperwork and system from compliance perspective, servicing the clients, running various successful campaigns, preparing several MIS etc. CSM shall also be responsible to develop the necessary papers to take care of the compliance requirement.

Eligibility Criteria

Qualification: Graduate and above

Experience : Experienced and Freshers

What are the skills required to be a Client Service Manager?

- Excellent Communication skills
- Confident, outcome oriented, patient, polite, tactful and diplomatic
- Innovative, with an ability to supervise when required
- Excellent personal presentation, especially when working with customers face to face
- A commitment of improving your customer service skills on an ongoing basis
- Flexible, Adaptable, Open minded Approach with Problem-solving skills.
- Must be able to collect, evaluate and interpret data, in both statistical and narrative form.
- Expertise in numbers and good math skills are critical
- Listening skills, to understand precisely what customers require
- Should have excellent written and oral communication skills.
- High level of integrity and ethical conduct
- Other skills required are related to problem-solving, entering and verifying data, knowledge of computers, various software applications and standard office equipment.

Job Description

- Must be able to collect, evaluate and interpret data, in both statistical and narrative form.
- Speed & Preciseness, in the execution of transactions.
- Coordinate internal work and determine the best utilisation of resources to increase customer satisfaction.
- Provide regular updates to clients on the progress that directly affect them
- Provide help and advice to customers using our organisation's products or services.
- Keep ahead of developments in customer service by reading relevant journals, going to meetings and attending seminars and fund manager events.
- Become a reliable point of contact for each customer that is required to establish a strong business relationship.
- Keeping accurate records of discussions or correspondence with customers. Sending welcome and other necessary emails from time to time on portfolio and Market Updates.
- Generating leads and efficiently keeping in regular contact with existing and new prospective clients.
- Learning about our Firms products or services and keeping up to date with changes.
- Train staff to deliver a high standard of customer service.
- Ensure that the Compliance requirements are taken care of.
- Assist in global client servicing and acquisition, Real estate advisory & lending services, Capital markets in India & abroad, Non-banking financial corporations & Assisting in managing client portfolios.
- Work in and with various Departments like Real estate advisory & lending services, Capital markets in India & abroad, Non-banking financial corporations etc

Package (Compensation and Other Incentives)

INR 1.5 lacs to 4.5 lacs p.a. (Plus Incentives and Bonuses).

Compensation will be reviewed annually or earlier and will consist of fixed salary, discretionary compensation, and specific local allowances, whenever applicable.

Compensation and Bonuses will be determined by several factors, including the firm's performance and individual performance.

You will also get the opportunity to go on regular training and seminars arranged by eminent Asset Management Companies (AMC) for enhancing knowledge about the products or services dealt in the financial markets.

Working Hours:

9:30Am to 6.30PM

Place of Work:

KESARI FINANCIAL SERVICES

1/A, Nilparna ,Near Saurashtra Society,
Vikas gruh Road,Paldi, Ahmedabad-380007

Thanks & Regards,
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