

Senior Wealth Advisor - Lagos

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Company: Fuzu

Location: Nigeria

Category: business-and-financial-operations

Job Summary

Contract Type:

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Requirements

Excellent interpersonal and communication skills

5-8 years working experience in the field

Fluent in Hausa is an added advantage

Excellent prospecting and marketing skills

Good knowledge of the Capital market in general and Wealth Management Services in particular.

Excellent presentation skills

Must possess good selling skills.

Strong quantitative and analytical skills.

Ability to seek a richer set of alternatives.

Ability to question assumptions.

Ability to proactively measure performance

Must have sound ethics and integrity.

Must have a high sense of integrity, accountability and dependability.

Must be ethical i.e. must follow the ideals and responsibilities of the banking industry as set out in the code of ethics guiding operations and operators in the industry.

Work Tools Required:

Laptop

Responsibilities

The preferred applicant's duties and responsibilities will include:

Market and sell appropriate investment products, financial and wealth management services/products to clients.

To generate new business ideas and devise strategies for acquiring new clients

To generate income in line with the set-target if the company

Prepare and deliver presentations/seminars to clients and prospects for business development purposes.

Comply with all industry rules and regulations

Works closely with families, individuals and businesses to provide customized recommendations to help them meet their goals.

Consult with clients on investment strategies products and services that are suitable for their needs.

Respond to client questions and requests.

Track and translate investment performance and make recommendations.

Build a strong and long term relationship with clients.

Establish a network of referrals.

Balances referral activities, customer follow up prospect building and administrator task.

Ability to create sales and marketing strategies for new clients.

Key Performance Metrics:

Number of new accounts opened.

Income generated from transactions.

Level of complaints/commendation from clients.

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