



State Bank of India

CENTRAL RECRUITMENT & PROMOTION DEPARTMENT,
CORPORATE CENTRE, MUMBAI

(Phone : 022-2282 0427; Fax : 022-2282 0411; E-mail : crpd@sbi.co.in)

RECRUITMENT OF SPECIALIST CADRE OFFICERS (CONTRACTUAL) IN STATE BANK OF INDIA

ADVERTISEMENT NO. CRPD/SCO/WM/2017-18/09

**Online Registration of Application & Payment of Fee :
31.01.2018 to 15.02.2018**

State Bank of India invites Online applications from Indian citizens for appointment in following Positions in Specialist Cadre Officers for Wealth Management in State Bank of India. Candidates are requested to apply Online through link given in Bank's website <https://bank.sbi/careers> or <https://www.sbi.co.in/careers>

PLEASE NOTE THAT

1. A candidate can apply for more than one post separately, subject to fulfilling eligibility criteria.
2. The process of Registration of application is completed only when fee is deposited with the Bank through Online mode on or before the last date for fee payment.
3. Before applying, candidates are requested to ensure that they fulfill the eligibility criteria for the post as on the date of eligibility. Shortlisting & interview will be purely provisional without verification of documents. Candidature will be subject to verification of details/documents with original when the candidate reports for interview if called.
4. In case the candidate is called for interview and he/she does not satisfy the eligibility criteria (age, educational qualification & experience etc.) he/she will neither be allowed to appear for the interview nor be entitled for reimbursement of any travelling expenses.
5. Candidates are advised to check Bank's website <https://bank.sbi/careers> or <https://www.sbi.co.in/careers> regularly for details and updates (including list of shortlisted/qualified candidates). Call letter/advise, where required will be sent by email only (No hard copy will be sent.)

VACANCIES AND OTHER DETAILS IN RESPECT OF VARIOUS POSTS AS DETAILED BELOW:

| Sr. No. | Position (Contractual Engagement) | Category-wise vacancies | | | | | | | | AGE (Years) as on 01.12.2017 | | Minimum Educational Qualifications as on 01.12.2017 | Experience/Specified Skill as on 01.12.2017 (excluding training & teaching experience) |
|---------|-----------------------------------|-------------------------|-----|----|----|-------|----|----|----|------------------------------|-----|--|--|
| | | GEN | OBC | SC | ST | Total | OH | VI | HI | Min | Max | | |
| 1 | Relationship Manager | 56 | 57 | 34 | 21 | 168 | 02 | 02 | 02 | 23 | 35 | Graduates from Government recognised University or Institution | 3+ years of experience as a Relationship Manager in Wealth Management with leading Public/Private/Foreign Banks/ Broking/ Security firms. The candidate should have adequate experience in building and managing relationship with High Networth Clients (having a minimum Total Relationship Value (TRV) of Rs.20.00 Lakh). |
| 2 | Relationship Manager - eWealth | 11 | 05 | 03 | 01 | 20 | - | - | - | 23 | 35 | Graduates from Government recognised University or Institution | <ul style="list-style-type: none"> • 3+ years of experience as a Relationship Manager in Wealth Management with leading Public/Private/Foreign Banks/ Broking/ Security firms, of which at least one year experience in managing relationship with HNI clients over telephone/video / digital channels. OR, • 3 years experience in sales/service of High Value financial products through digital medium (telephone/video or web). |
| 3 | Relationship Manager - NRI | 07 | 02 | 01 | - | 10 | - | - | - | 23 | 35 | Graduates from Government recognised University or Institution | 3+ years of experience as a Relationship Manager in Wealth Management with leading Public/Private/Foreign Banks/ Broking/ Security firms. The candidate should have adequate experience in building and managing relationship with High Networth NRI Clients. |
| 4 | Relationship Manager - Corporate | 03 | 01 | - | - | 04 | - | - | - | 23 | 35 | Graduates from Government recognised University or Institution | 3+ years of experience in acquiring and managing high value relationship with Corporates/ Institutions/SMEs, TACS etc. |
| 5 | Acquisition Relationship Manager | 40 | 19 | 13 | 08 | 80 | 01 | 01 | 01 | 22 | 35 | Graduates from Government recognised University or Institution | 2+ years of experience in acquisition of High Networth Clients (having a minimum Total Relationship Value (TRV) of Rs.20.00 Lakh) in Wealth Management business with leading Public/ Private/Foreign Banks/Broking/Security firms and other Financial Institutions. |
| 6 | Investment Counsellor (IC) | 11 | 12 | 07 | 03 | 33 | 01 | - | - | 28 | 40 | <ul style="list-style-type: none"> • Graduates/ Post Graduates from Government recognized University or Institution. • AMFI / NISM (Module-V) certification mandatory • CFP preferred | <ul style="list-style-type: none"> • Minimum 5 Years of experience as an investment advisor/ counsellor/part of product team in Wealth Management organisation. • Good knowledge of investments and markets across asset classes. • Experience in managing and advising client portfolios. • Good knowledge of asset allocation and re-balancing techniques. • Superior presentation skills & other core competencies like leadership and team work. • Experience in products of fixed income, equity & alternate markets. |
| 7 | Relationship Manager – Team Lead | 11 | 07 | 03 | 01 | 22 | - | - | - | 28 | 40 | Graduates from Government recognized University or Institution. | <ul style="list-style-type: none"> • 8+ years of experience in relationship management in wealth management. • Experience as a Team Lead is preferred. |

(Contd. on next page...)

| Sr. No. | Position (Contractual Engagement) | Category-wise vacancies | | | | | | | | AGE (Years) as on 01.12.2017 | | Minimum Educational Qualifications as on 01.12.2017 | Experience/Specified Skill as on 01.12.2017 (excluding training & teaching experience) |
|---------|--|-------------------------|-----|----|----|-------|----|----|----|------------------------------|-----|--|--|
| | | GEN | OBC | SC | ST | Total | OH | VI | HI | Min | Max | | |
| 8 | Customer Relationship Executive (CRE) | 30 | 14 | 08 | 03 | 55 | 01 | - | 01 | 20 | 35 | Graduates from Government recognized University or Institution. | <ul style="list-style-type: none"> Experience in documentation requirements of financial products and good communications skills would be desirable. Should have a valid driving licence for two wheeler (mandatory) |
| 9 | Central Research Team (CRT-VP Portfolio Analysis and Data Analytics) | 01 | - | - | - | 01 | - | - | - | 30 | 40 | MBA/PGDM or Post Graduation in Statistics/ Data Analytics from Government recognized University or Institution. | Minimum 5 years of experience in Fixed Income Research/ MF Research/ Equity and Derivative Research/Portfolio Analytics in Wealth Management Firm/Bank/Equity Broking Firm/AMC. |
| 10 | Zonal Head Sales (Retail) | 02 | - | - | - | 02 | - | - | - | 35 | 50 | Graduates from Government recognized University or Institution | <ul style="list-style-type: none"> Minimum 15 years experience in managing sales in Wealth Management/ Retail Banking / Investments in the financial services industry. Out of which minimum 5 years experience in leading a large team of Relationship Managers and Team Lead in Wealth Management business. |
| 11 | Head (Operations) | 01 | - | - | - | 01 | - | - | - | 35 | 45 | MBA/PGDM from Government recognized University or Institution. | <ul style="list-style-type: none"> Minimum 15 years experience in financial services, Investment advisory and private banking out of which minimum 8 years of experience in setting up and Managing Mid office, Back office and Branch Operations of Wealth Management set up. Exposure on CRM platform for Wealth Management is preferred. Experience in handling trade and data for transactions across asset classes like equity, bonds, mutual funds and alternates. Should have managed a large operations team in Wealth Management business. |
| 12 | Compliance Officer | 01 | - | - | - | 01 | - | - | - | 25 | 40 | <ul style="list-style-type: none"> Graduates from Government recognized University or Institution. Professional Qualification in Compliance preferred NISM Certification : 3(A) Mandatory | Minimum 5 years of experience in Wealth Management business, out of which minimum 3 years experience in Compliance in Wealth Management. |
| 13 | Project Development Manager – Business | 01 | - | - | - | 01 | - | - | - | 25 | 40 | MBA/MMS/PGDM from Government recognized University or Institution. | Minimum 4 years' experience in banking preferably in a supervisory function. |
| 14 | Project Development Manager – Technology | 01 | - | - | - | 01 | - | - | - | 25 | 40 | MBA/MMS/PGDM/ME/M.Tech / BE/B.Tech from Government recognized University or Institution. | Minimum 4 years' experience in banking Technology preferably in a business function. |
| 15 | Manager (Business Development) | 01 | - | - | - | 01 | - | - | - | 30 | 40 | MBA/PGDM from Government recognized University or Institution. | Minimum 5 years experience in Bank/Wealth Management firms/broking firms. Experience in business development in wealth management area. |
| 16 | Investment Advisor (Retail & Corporate) | 02 | - | - | - | 02 | - | - | - | 28 | 40 | <ul style="list-style-type: none"> Graduates from Government recognized University or Institution. Certified advisors NISM/CWM mandatory CFP preferred | <ul style="list-style-type: none"> 5+ years of experience in product expert inputs role in Wealth Management. Out of which 3+ years of experience in investment counselling role in Wealth Management is preferred. <p>Preferred Skills :</p> <ul style="list-style-type: none"> Good knowledge of investments and markets across asset classes. Experience in managing and advising client portfolios. Good knowledge of asset allocation and re-balancing techniques. Superior presentation skills & other core competencies like leadership and team work. Experience in products of fixed income, equity & alternate markets. |
| 17 | Central Operations Team Support | 02 | - | - | - | 02 | - | - | - | 30 | 40 | Graduates from Government recognized University or Institution. | <ul style="list-style-type: none"> Minimum experience of 3 years in financial services, investment advisory, private banking or Wealth Management Solution Providers, out of which minimum two years experience in Central Operations in Wealth Management business. <p>Preferred Skills :</p> <ul style="list-style-type: none"> Excellent knowledge of Equity Products, Structured Products, PMS, Mutual funds and Advisory. |
| 18 | Central Research Team Support | 01 | - | - | - | 01 | - | - | - | 25 | 35 | Graduate/Post Graduate in Commerce/Finance/Economics/ Management/Mathematics/ Statistics from Government recognized University or Institution. | <ul style="list-style-type: none"> Minimum experience of 3 years in financial services providing support to Research / Publications departments. <p>Preferred Skills :</p> <ul style="list-style-type: none"> Candidate should be proficient in Microsoft Excel, Power point, Word, Outlook. Candidate should have inclination to undertake research by reading various reports or websites. Candidate should be able to support Research team by aggregating and providing support for analysing data through various research tools/ software like BLOOMBERG, REUTERS, CRISIL, ICRA etc. |

| Sr. No. | Position (Contractual Engagement) | Category-wise vacancies | | | | | | | | AGE (Years) as on 01.12.2017 | | Minimum Educational Qualifications as on 01.12.2017 | Experience/Specified Skill as on 01.12.2017 (excluding training & teaching experience) |
|---------|-----------------------------------|-------------------------|-----|----|----|-------|----|----|----|------------------------------|-----|---|--|
| | | GEN | OBC | SC | ST | Total | OH | VI | HI | Min | Max | | |
| 19 | Zonal Head – eWealth | 01 | – | – | – | 01 | – | – | – | 35 | 50 | Graduates from Government recognized University or Institution. | <ul style="list-style-type: none"> Minimum 15 years experience in managing sales in Wealth Management/ Retail Banking / Investments in the financial services industry. Out of which minimum 5 years experience in leading large team of Relationship Managers. Experience in managing sales and service of financial products through digital channels preferred. |
| 20 | Zonal Head / Team Lead NRI | 01 | – | – | – | 01 | – | – | – | 35 | 50 | Graduates from Government recognized University or Institution. | Minimum 15 years experience in managing sales in Wealth Management/ Retail Banking / Investments in the financial services industry. Out of which minimum 5 years experience in NRI Wealth Management. |

ABBREVIATIONS
Category: GEN-General, SC- Scheduled Caste, ST- Scheduled Tribe, OBC- Other Backward Classes, PWD- Persons with Disability, OH- Orthopaedically Handicapped, HI- Hearing Impaired, VI-Visually Impaired
NOTE :

- The number of vacancies including reserved vacancies mentioned above are provisional and may vary according to the actual requirement of the Bank.
- The educational qualification prescribed for various posts are the minimum. Candidate must possess the qualification and relevant full time experience/spcified skill as on 01.12.2017
- Candidates belonging to reserved category including Person with Disabilities for whom no reservation has been mentioned are free to apply for vacancies announced for unreserved category, if they fulfil all the eligibility condition applicable to unreserved category.
- Relaxation in upper age limit for PWD candidates as per govt. guidelines.
- Reservation for PWD is horizontal within the overall vacancies for the post.
- PWD candidate should produce a certificate issued by a competent authority as per the Govt. of India guidelines.
- Candidates belonging to OBC category but coming in the 'creamy layer' are not entitled to OBC reservation and age relaxation. They should indicate their category as 'GENERAL' or GENERAL (OH/VI/HI), as applicable.
- A declaration will have to be submitted in the prescribed format by candidates seeking reservation under OBC category stating that he/she does not belong to the creamy layer as on 01.12.2017. OBC certificate containing the 'Non-creamy layer' clause, issued during the period 01.04.2017 to the date of interview, should be submitted by such candidates, if called for interview.
- Caste certificate issued by Competent Authority on format prescribed by the Government of India will have to be submitted by the SC/ST/OBC candidates, if called for interview.

A. JOB PROFILE :

| S. No. | Post | Job Profile & KRAs in brief |
|--------|--------------------------------|--|
| 1 | Relationship Manager | <ul style="list-style-type: none"> Acquiring, nurturing, growing and strengthening relationship within the affluent and HNI segment of customers in order to meet business objectives. Cross selling a range of investment and insurance products to these customers in order to meet their financial planning objectives and thus attaining the revenue objectives of the Wealth Management business. Focusing on increasing the Total Relationship Value (TRV) and Assets Under Management (AUM) of customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> > Acquire HNI and Affluent Customers > Deepen Relationships <ul style="list-style-type: none"> Manage the customers of the branch who are defined as Affluent / HNI customers. Grow the CASA of this portfolio Cross-sell mortgages, credit cards and drive channel migration Acquire more customers from the same household. Service these customers. > Wealth Management <ul style="list-style-type: none"> Do a financial needs analysis and risk profiling for the customers in the portfolio Periodic portfolio reviews for all customers Cross-sell investments, life insurance, general insurance and SIP Ensure all customers have a CASA for routing their investments > Compliance <ul style="list-style-type: none"> Ensure AMFI, IRDA and NISM certification. Ensure all customer instructions are executed the same day. Ensure 100 % documentation of all transactions. > Branch Development <ul style="list-style-type: none"> Conduct branch insurance & investment seminars to spread financial awareness |
| 2 | Relationship Manager - eWealth | <ul style="list-style-type: none"> Acquiring, nurturing, growing and strengthening relationship within the Affluent and HNI segment of customers through eWealth Centre in order to meet business objectives. Cross selling a range of investment and insurance products to these customers in order to meet their financial planning objectives and thus attaining the revenue objectives of the Wealth Management business. Focusing on increasing the Total Relationship Value (TRV) and Assets Under management (AUM) of customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> > Acquire HNI and Affluent Customers for eWealth Centre > Deepen Relationships <ul style="list-style-type: none"> Manage the customers of the branch who are defined as Affluent / HNI customer through Bank's eWealth Centres Grow the CASA of this portfolio Cross-sell mortgages, credit cards and drive channel migration Acquire more customers from the same household and serve them through eWealth Centres Service these customers. > Wealth Management <ul style="list-style-type: none"> Do a Financial Needs Analysis and Risk Profiling for the customers in the portfolio Periodic Portfolio reviews for all customers Cross-sell investments, life insurance, general insurance and SIP Ensure all customers have a CASA for routing their investments > Compliance <ul style="list-style-type: none"> Ensure AMFI, IRDA and NISM certification. Ensure all customer instructions are executed the same day. Ensure 100 % documentation of all transactions. > Branch Development <ul style="list-style-type: none"> Conduct branch Insurance & Investment seminars to spread financial awareness |

A. JOB PROFILE :

| S. No. | Post | Job Profile & KRAs in brief |
|--------|---|---|
| 3 | Relationship Manager -NRI | <ul style="list-style-type: none"> ● Acquiring, nurturing, growing and strengthening relationship within the Affluent and HNI customers in NRI segment in order to meet business objectives. ● Cross selling a range of investment and insurance products to these customers in order to meet their Financial Planning objectives and thus attaining the revenue objectives of the Wealth Management business. ● Focusing on increasing the Total Relationship Value (TRV) and Assets Under Management (AUM) of customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Acquire HNI and Affluent Customers in NRI Segment. ➤ Deepen Relationships <ul style="list-style-type: none"> ○ Manage the customers of the branch who are defined as Affluent / HNI customer in NRI Segment ○ Grow the CASA of this portfolio ○ Cross-sell mortgages, credit cards and drive channel migration ○ Acquire more customers from the same household. ○ Service these customers. ➤ Wealth Management <ul style="list-style-type: none"> ○ Do a financial needs analysis and risk profiling for the customers in the portfolio ○ Periodic portfolio reviews for all customers ○ Cross-sell investments, life insurance, general insurance and SIP ○ Ensure all customers have a CASA for routing their investments ➤ Compliance <ul style="list-style-type: none"> ○ Ensure AMFI, IRDA and NISM certification. ○ Ensure all customer instructions are executed the same day. ○ Ensure 100 % documentation of all transactions. ➤ Branch Development <ul style="list-style-type: none"> ○ Conduct branch insurance & investment seminars to spread financial awareness |
| 4 | Relationship Manager - Corporate | <ul style="list-style-type: none"> ● Acquiring, nurturing, growing and strengthening relationship within Corporate and SME segment of customers in order to meet business objectives. ● Cross selling a range of investment and insurance products of these customers in order to meet their financial planning objectives and thus attaining the revenue objectives of the Wealth Management business. ● Focusing on increasing the Total Relationship Value (TRV) and Assets Under management (AUM) of customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Acquire Corporate/SMEs/Institutions/Trusts etc. fulfilling the eligibility criteria. ➤ Deepen Relationships <ul style="list-style-type: none"> ○ Manage the customers of the branch who are onboarded to Wealth Management as Corporate & SME segment of customers. ○ Grow the CASA of this portfolio ○ Cross-sell mortgages, credit cards and drive channel migration ○ Service these customers. ➤ Wealth Management <ul style="list-style-type: none"> ○ Do a Financial Needs Analysis and Risk Profiling for the customers in the portfolio ○ Periodic Portfolio reviews for all customers ○ Cross-sell investments, life insurance, general insurance and SIP ○ Ensure all customers have a CASA for routing their investments ➤ Compliance <ul style="list-style-type: none"> ○ Ensure AMFI, IRDA and NISM certification. ○ Ensure all customer instructions are executed the same day. ○ Ensure 100 % documentation of all transactions. ➤ Branch Development <ul style="list-style-type: none"> ○ Conduct branch Insurance & Investment seminars to spread financial awareness |
| 5 | Acquisition Relationship Manager | <ul style="list-style-type: none"> ● Acquiring, nurturing, growing and strengthening relationship within the Affluent and HNI segment of customers in order to meet business objectives. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Acquiring new Affluent Customers to the Bank for the Wealth Management Business. ➤ On-boarding Bank's affluent customers for the Wealth Management Business. ➤ Present the various benefits and services of the Bank's Wealth Management Initiative to Customers ➤ Acquire more customers from the same household ➤ Obtain referrals and leads |
| 6 | Investment Counsellor | <ul style="list-style-type: none"> ● Advising clients on range of financial services products. ● Wide ranging experience across categories such as: MF, FI, Structured products, Discretionary portfolios ● Strong focus on due diligence, quantitative technique and asset allocation. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Assisting the Relationship Manager in providing expert opinion regarding investments. <ul style="list-style-type: none"> ○ Work closely with RMs for creation and implementation of their financial plans. ○ Research and investigate new investment opportunities to determine relevance for clients. ○ Advising the customers on the right investment products based on their needs and improving customer's understanding of complex and structured products. Answer clients' questions about the purposes and details of financial plans and strategies referred to by RMs. ○ Research/create house view on investment products and market. ○ Coaching and regularly updating the RM team on latest developments and investment products. ➤ Wealth Management <ul style="list-style-type: none"> ○ Do a Financial Needs Analysis and Risk Profiling for the customers in the portfolio ○ Periodic Portfolio reviews for all customers ➤ Compliance <ul style="list-style-type: none"> ○ Ensure AMFI, IRDA and NISM certification. |
| 7 | Relationship Manager Team Lead | <ul style="list-style-type: none"> ● Managing a team of Relationship Managers for the Wealth Management business. ● Acquiring, nurturing growing and strengthening relationship within the affluent and HNI segment of customers in order to meet business objectives. ● Cross selling a range of investment and insurance products to these customers in order to meet their financial planning objectives and thus attaining the revenue objectives of the wealth management business. ● Focusing on increasing the total relationship value (TRV) and Assets Under Management (AUM) of customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Acquire HNI and Affluent Customers ➤ Managing the team of Relationship Managers and ensuring the team achieves its targets. ➤ Ensuring compliance of guidelines systems & procedures by the Relationship Manager team. ➤ Allocation of leads and customers to appropriate team members. |

A. JOB PROFILE :

| S. No. | Post | Job Profile & KRAs in brief |
|--------|---|---|
| 7 | Relationship Manager Team Lead | <ul style="list-style-type: none"> ➤ Deepen Relationships <ul style="list-style-type: none"> ○ Manage the customers of the Bank who are defined as affluent/HNI customers. ○ Grow the CASA of this portfolio ○ Cross-sell mortgages, credit cards and drive channel migration ○ Acquire more customers from the same household ○ Service these customers. ➤ Wealth Management <ul style="list-style-type: none"> ○ Do a Financial Needs Analysis and Risk Profiling for the customers in the portfolio ○ Periodic Portfolio reviews for all customers ○ Cross-sell investments, life insurance, general insurance and SIP ○ Ensure all customers have a CASA for routing their investments ➤ Compliance <ul style="list-style-type: none"> ○ Ensure all customer instructions are executed the same day. ○ Ensure 100 % documentation of all transactions. ➤ Branch Development <ul style="list-style-type: none"> ○ Conduct branch Insurance & Investment seminars to spread financial awareness |
| 8 | Customer Relationship Executive | <ul style="list-style-type: none"> ● CREs are responsible for providing on ground support to Relationship Managers in collecting the documents from the customers and sending it to the relevant department for service requests where documentation or in person meeting with customer is required. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Assisting Relationship Managers in collecting and delivery of documents from/ to Wealth Customers. ➤ Assisting Service Managers in completion of onboarding documentation. ➤ Assisting Relation Managers/ Service Managers in collection and delivery of documents in different departments of the Bank. |
| 9 | Central Research Team (CRT-VP Portfolio Analysis and Data Analytics) | <ul style="list-style-type: none"> ● The Portfolio analyst would work closely with Product & Research Head and conduct performance monitoring of portfolios held by the various customers, liaison with Market Data Aggregators and Research providers. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Creation of asset allocations and model portfolios of risk profiles. ➤ Performance monitoring of portfolios held by the various customers ➤ Liaison with other departments and outside agencies to have best in class technology driven solutions to provide advisory. ➤ Single point of contact for all data requirements pertaining to Wealth Management Business. ➤ Data analytics / Big Data analytics to support sales team for sales strategy formulation. |
| 10 | Zonal Head Sales (Retail) | <ul style="list-style-type: none"> ● Managing a Wealth Management Sales in the zone allocated. ● Focusing on increasing the Total Relationship Value (TRV) and Assets Under Management (AUM) of customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Managing the Zonal Sales for the Wealth Management Business ➤ Managing the Relationship Manager Team Leads and Relationship Managers ensuring achievements of budgets by the RM teams. ➤ Acquire HNI and Affluent customers. ➤ Managing the Team of Relationships Managers and ensuring the team achieves its targets. ➤ Ensuring compliance of guidelines systems & procedures by the Relationship Manager Team. ➤ Compliance <ul style="list-style-type: none"> ○ Ensure all customer instructions are executed the same day. ○ Ensure 100 % documentation of all transactions. ➤ Zone Development <ul style="list-style-type: none"> ○ Conduct Zone Investment seminars to spread financial awareness ○ Customer Meets and Campaigns. ➤ Ensuring Customer Satisfaction |
| 11 | Head (Operations) | <ul style="list-style-type: none"> ● Supervise and ensure smooth operations of Wealth Management business of the bank including: Database Management ensuring transactions feeds are duly received from RTA's / Manufacturer's and client reports, accuracy and timeliness of MIS. Daily data upload of all products, tracker and master maintenance, folio reconciliation, application and access control. ● Receivable processing. Tracking Income/trail receipts, reconciling income and rate differences, rates management and processing revenue credit within defined timelines. Computing variable pay as per defined rules. Vendor management and internal department of SLAs. Client management: Client on boarding process including risk profile. Client mapping, client welcome call. Mid office : Tracking risk deviation forms and keep track, managing un-mapped customers, managing service requests of Branches and internal customers, green pin related issues and system not working issues. ● Track all transactions and report deviation as per SOP, EUIN/NISM Deviations process of de-boarding ineligible customers. ● Support to Sales Team : Assist Sales Team to grow and activate Wealth Customers, facilities deepening initiatives, ensure customers satisfactions, ARN change process, FD rollover tracking and reporting, Leads flow supports, MIS accuracy. ● Client Portal Management, Staff Training <p>KRAs</p> <ul style="list-style-type: none"> ➤ Database Management. ➤ Ensure transaction feeds are duly received from RTA's/Manufacturer's and client reports and MIS reflect correctly daily data upload of all products. ➤ Tracker and master maintenance folio reconciliation, application and access control. ➤ Receivable processing. ➤ Tracking income/Trial receipts, reconciling income and rate differences, rates management and processing revenue credit within defined timelines. ➤ Computing variable pay as per defined rules. ➤ Vendor management and internal department management of SLAs. ➤ Client management: Client on boarding process including Risk profile, client mapping, client welcome call ➤ Mid Office: Tracking risk deviation forms and keep track, managing un-mapped customers, managing service requests of Branches and internal customers, green pin related issues and system not working issues. ➤ Track all transactions and report deviation as per SOP, EUIN/NISM deviations, how to downgrade customer if needed. ➤ Sales Team Support : Assist Sales Team to grow active Wealth Customers, facilitate client deepening initiatives, customer satisfaction. ARN change process, FD rollover, Leads flow support, MIS accuracy. ➤ Client Portal Management ➤ Training. |
| 12 | Compliance Officer | <ul style="list-style-type: none"> ● Ensuring compliance of the Wealth Management business including investment advisory activities with the regulatory guidelines. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Ensuring compliance of various regulations of SEBI, RBI and other regulatory bodies for the Wealth Management, including investment advisory department ➤ Creation of Internal Compliance guidelines to be followed by Wealth Management and Advisory Teams (Sales, Service, Operations and advisory) ➤ Liaising with regulatory bodies for updates on guidelines-IRDA, AMFI, RBI, NRI guidelines in key geographies (USA, UK, Singapore, Middle-East, Australia) ➤ Resolution of observations by regulators on Wealth Management practices-both in India & globally. ➤ Monitoring the Compliance, by the Wealth Management, including Advisory Teams in respect of requirements of the regulatory guidelines, notifications and instructions from time to time. ➤ Submission of necessary disclosures to SEBI and other regulatory bodies. |

A. JOB PROFILE :

| S. No. | Post | Job Profile & KRAs in brief |
|--------|--|---|
| 13 | Project Development Manager - Business | <p>Job Profile & KRAs</p> <ul style="list-style-type: none"> ➤ Managing relationships with various business partners. ➤ Exploring and entering into new business partnerships for existing as well as new business streams ➤ Working closely with the business heads on strategy formulation and reporting to top management. ➤ Co-ordinating with the PMO team and LHO teams during rollout. ➤ Creating and documenting standard operating processes to be followed for existing and new business lines. |
| 14 | Project Development Manager - Technology | <p>Job Profile & KRAs</p> <ul style="list-style-type: none"> ➤ Managing relationships with the technology partners. ➤ Understanding and communicating business requirements to the IT team and technology partners. ➤ Working closely with the Bank IT teams to ensure timely delivery of developments. ➤ Co-ordinating with various Bank IT teams and business teams for new developments, integrations or bug-fixes in existing Bank platforms. ➤ Creating and documenting operating manuals for technology interfaces at user level. |
| 15 | Manager - (Business Development) | <p>Job Profile & KRAs</p> <ul style="list-style-type: none"> ➤ Initiate client engagement activities on ground and online initiatives like arrange webinars mail campaigns, learning initiatives. ➤ Database Management. ➤ Conduct lead generation activities and standardize corporate worksite, venue marketing, telecalling activities and residential society activity. ➤ Drive E-Wealth usage and LMS usage. ➤ Design/ Customize and target Wealth client lifecycle. ➤ Device sale kit and ensure usage. ➤ Obtain and use of insights from NPS studies. ➤ Deal with vendors for central lead generations (Linked in, Money Central, NYKA etc.) ➤ Initiate and manage use of market and client insights. ➤ Competitors benchmarking. ➤ Support and development of digital strategy ➤ Lead management and taking feedback from RM. ➤ Ensure EMS usage. ➤ Liaise with marketing team and help build the micro site, landing page for improving efficiency of the lead. |
| 16 | Investment Advisor (Retail & Corporate) | <ul style="list-style-type: none"> ● Managing Investment Advisory Mandates received by the Bank SIDD/ Subsidiary from its Corporate and individual clients. ● Analysing client portfolios. ● Monitoring investments advise performance etc. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Understanding the regulatory and the clients internal investments guidelines for various types of entities-retirement funds, charitable trusts, LLPs, clubs etc. ➤ Understanding the investment objectives of a clients and advise investments based on existing portfolio, regulatory/internal guidelines, market valuations and expected investments trends. ➤ Analysing client portfolios and making detailed presentations on the findings. ➤ Keeping the client updated and conduct portfolios reviews as per mandates. ➤ Managing investment Advisory Mandates received by the Bank SIDD/Subsidiary from its corporate and individual clients. |
| 17 | Central Operations Team Support | <ul style="list-style-type: none"> ● Timely and effective completion of daily operations, AMC coordination, CPA generation and upload, END-of Day Activates etc. <p>KRAs</p> <ul style="list-style-type: none"> ➤ END-of day Activities ➤ CPA generation and upload ➤ Fetching feed files from RTAs/DWP/CRISIL ➤ New investor documents upload ➤ AMC coordination ➤ Order reconciliation ➤ PMS data upload ➤ All troubleshooting/rectification tasks relating to Central Operations Team operation. |
| 18 | Central Research Team Support | <ul style="list-style-type: none"> ● Role will include creating and updating excel worksheets related to : Macro Economy, Stock & Sector research, Fixed income research, creating portfolio review templates etc. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Creating and updating excel worksheets related to : <ul style="list-style-type: none"> ○ Macro Economy ○ Stock & Sector research ○ Fixed Income research ○ Mutual fund , PMS & other products research ○ Model portfolios ➤ Creating portfolio review templates which are used in order to support investment Counsellors and Relationship Managers. ➤ Preparing portfolio review templates and to support investment Counsellors and Relationship Managers. ➤ To work closely with the research team in terms of designing as well as rolling out daily, weekly, monthly publications/presentations on regular basis. |
| 19 | Zonal Head – eWealth | <ul style="list-style-type: none"> ● Managing a Wealth Management Sales in the Zone allocated through eWealth Centre ● Focusing on increasing the Total Relationship Value (TRV) and Asset Under Management (AUM) of customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Managing eWealth Centre Teams (RMs, ARMs, SMs, CREs) and inspire them to achieve business/service quality targets. ➤ Managing the Relationship Manager Team Leads and Relationship Managers ensuring achievement of budgets by the RM Teams. ➤ Monitoring calls and call quality and give feedback for continuous quality improvements, check profile base selling etc. and use it to grow. ➤ Acquire HNI and Affluent Customers through Bank's eWealth Centre. ➤ Managing the team of Relationship Manager and ensuring the team achieves its targets ➤ Ensuring compliance of guidelines systems & procedures by Relationship Manager Team. ➤ Compliance <ul style="list-style-type: none"> ○ Ensure all customer instructions are executed the same day ○ Ensure 100% documentation of all transactions. ➤ Zone Development <ul style="list-style-type: none"> ○ Conduct Zone Investments seminars to spread financial awareness. ○ Customer Meets and Campaigns ➤ Periodical physical meeting with NRI clients wherever needed. |

A. JOB PROFILE :

| S. No. | Post | Job Profile & KRAs in brief |
|--------|-----------------------------------|--|
| 20 | Zonal Head / Team Lead NRI | <ul style="list-style-type: none"> ● Managing a Wealth Management Sales in the Zone allocated ● Focusing on increasing the Total Relationship Value (TRV) and Assets Under Management (AUM) of NRI segment customers as per the business objectives. <p>KRAs</p> <ul style="list-style-type: none"> ➤ Managing the Relationship Manager Team Leads and Relationship Managers ensuring achievement of budgets of NRI segment by the RM Teams. ➤ Monitoring calls and call quality and give feedback for continuous quality improvements, check profile base selling etc. and use it to grow. ➤ Acquire HNI and Affluent Customers in NRI segment through Bank's eWealth Centre. ➤ Managing the team of Relationship Manager and ensuring the team achieves its targets ➤ Ensuring compliance of guidelines, systems & procedures by Relationship Manager Team. ➤ Compliance <ul style="list-style-type: none"> ○ Ensure all NRI customer instructions are executed the same day ○ Ensure 100% documentation of all transactions. ➤ Zone Development <ul style="list-style-type: none"> ○ Conduct Zone Investments seminars to spread financial awareness. ○ Customer Meets and Campaigns ➤ Periodical physical meeting with NRI clients wherever needed. |

- B. ELIGIBILITY CRITERIA :** Candidate should fulfill the eligibility criteria stipulated against posts mentioned above.
- C. CONTRACT PERIOD :** 5 years & renewable further period of 5 years at the discretion of the Bank.
- D. HOW TO APPLY :** Candidates should have valid email ID which should be kept active till the declaration of results. It will help him/her in getting call letter/interview advices etc. by email.
- a) GUIDELINES FOR FILLING ONLINE APPLICATION :**
- i) Candidates will be required to register themselves online through Bank's website <https://bank.sbi/careers> or <https://www.sbi.co.in/careers> and pay the application fee using debit card/ credit card/ Internet Banking etc.
 - ii) Candidates should first scan their latest photograph and signature. Online application will not be registered unless candidate uploads his/her photo and signature as specified. Sufficient copies of the same photograph should be retained for use at the time of Interview. Failure to produce the same photograph at the time of Interview may lead to disqualification.
 - iii) Candidates should fill the application carefully. Once the application is filled in completely, candidate should submit the data. In the event of candidate not able to fill the data in one go, he can save the data already entered. When the data is saved, a provisional registration number and password will be generated by the system and displayed on the screen. **Candidate should note down the registration number and password.** They can re-open the saved data using registration number and password and edit the particulars, if needed. This facility will be available for three times only. Once the application is filled in completely, candidate should submit the data and proceed for online fee payment.
- b) PAYMENT OF FEES :**
- i) Application fees and Intimation Charges (Non-refundable) Rs. 600/- for General and OBC candidates, Rs.100/- (Intimation charges only) for SC/ST/PWD candidates.
 - ii) Fee payment will have to be made online through payment gateway available thereat.
 - iii) After ensuring the correctness of the particulars of the application form candidates are required to pay fees through the payment gateway integrated with the application. No change/edit will be allowed thereafter.
 - iv) The payment can be made by using debit card / credit card / Internet Banking etc. by providing information as asked on the screen. Transaction charges for online payment, if any, will be borne by the candidates.
 - v) On successful completion of the transaction, e-receipt and application form with the date entered by the candidate will be generated, which should be printed and retained by the candidate.
 - vi) If the online transaction is not successfully completed, please register again and make payment online.
 - vii) There is also a provision to reprint the e-Receipt and Application form containing fee details, at later stage.
- E. Candidate has to upload following documents at the time of Online registration of application :**
- i) Brief Resume (DOC or DOCX)
 - ii) ID Proof (PDF)
 - iii) Proof of Date of Birth (PDF)
 - iv) Educational Certificates (PDF)
 - v) Experience Certificate (PDF)
 - vi) Valid driving licences for CRE (PDF)
 - vii) e-receipt for fee payment
 - viii) PWD certificate (as applicable)
- GUIDELINES FOR DOCUMENTS UPLOAD IS AS UNDER :**
- i) Please ensure that Documents uploaded are clear and readable.
 - ii) Once uploaded, documents can not be edited, after submission.
- DOCUMENTS :**
- i) All Documents must be in PDF except Resume which should be in DOC or DOCX format.
 - ii) Page size of the document to be A4.
 - iii) Size of the file should not be exceeding 500 KB.
 - iv) In case of Document being scanned, please ensure it is saved as PDF and size not more than 500 KB as PDF. If the size of the file is more than 500 KB, then adjust the setting of the scanner such as the DPI resolution, no. of colors etc., during the process of scanning.
- DOCUMENT SCANNING :**
- i) Set the scanner resolution to a minimum of 200 dpi (dots per inch)
 - ii) Set color to True Color
 - iii) File size as specified above.
- iv) Crop the image in the scanner to the edge of the documents like certificates, then export/save as PDF (as specified above)
 - v) If the file size and format are not as specified, an error message will be displayed
- PROCEDURE FOR UPLOADING DOCUMENT :**
- i) There will be separate links for uploading each document.
 - ii) Click on the respective link "Upload"
 - iii) Browse & select the location where the PDF, DOC or DOCX file has been saved.
 - iv) Select the file by clicking on it.
 - v) Click the 'Upload' button.
 - vi) Click Preview to confirm the document is uploaded and accessible properly before submitting the application.
 - vii) Once submitted, Documents uploaded can not be changed.
- F. CALL LETTER FOR INTERVIEW :**
- Intimation/call letter for interview will be sent by email or will be uploaded on Bank's website. NO HARD COPY WILL BE SENT.
- G. SELECTION PROCEDURE :** Selection will be based on Short listing and one or more rounds of Personal Interview. Mere fulfilling minimum qualification and experience will not vest any rights in candidate for being called for interview. The shortlisting committee constituted by the Bank will decide the shortlisting parameters and thereafter, adequate number of candidates, as decided by the Bank will be shortlisted for interview. The decision of the Bank to call the candidates for the interview shall be final. No correspondence will be entertained in this regard.
- Merit List :** Merit list for selection will be prepared in descending order on the basis of scores obtained in interview only. In case more than one candidate score the cut off marks [common mark at cut off point], such candidates will be ranked according to their age in descending order, both in the selection list as well as in the wait list.
- H. EMOLUMENTS :** The compensation package (CTC) would comprise of fixed and variable components but not a limiting factor for a suitable candidate.
- I. PLACE OF POSTING :** Mumbai or Various eWealth Centers/Hubs Pan India.
- J. GENERAL INFORMATION :**
- i) Candidates should satisfy themselves about their eligibility for the post applied for.
 - ii) Candidates serving in Govt./Quasi Govt. offices, Public Sector undertakings including Nationalised Banks and Financial Institutions are advised to submit 'No Objection Certificate' from their employer at the time of interview, failing which their candidature may not be considered and travelling expenses, if any, otherwise admissible, will not be paid.
 - iii) In case of selection, candidates will be required to produce proper discharge certificate from the employer at the time of taking up the appointment.
 - iv) Candidates are advised in their own interest to apply online well before the closing date and not to wait till the last date to avoid the possibility of disconnection / inability / failure to log on to the website on account of heavy load on internet or website jam.
 - v) SBI does not assume any responsibility for the candidates not being able to submit their applications within the last date on account of aforesaid reasons or for any other reason beyond the control of SBI.
 - vi) IN CASE IT IS DETECTED AT ANY STAGE OF RECRUITMENT THAT A CANDIDATE DOES NOT FULFIL THE ELIGIBILITY NORMS AND / OR THAT HE / SHE HAS FURNISHED ANY INCORRECT / FALSE INFORMATION OR HAS SUPPRESSED ANY MATERIAL FACT(S), HIS / HER CANDIDATURE WILL STAND CANCELLED. IF ANY OF THESE SHORTCOMINGS IS / ARE DETECTED EVEN AFTER APPOINTMENT, HIS /HER SERVICES ARE LIABLE TO BE TERMINATED.
 - vii) DECISIONS OF BANK IN ALL MATTERS REGARDING ELIGIBILITY, CONDUCT OF INTERVIEW, OTHER TESTS AND SELECTION WOULD BE FINAL AND BINDING ON ALL CANDIDATES. NO REPRESENTATION OR CORRESPONDENCE WILL BE ENTERTAINED BY THE BANK IN THIS REGARD.
 - viii) Appointment of selected candidate is subject to his/her being declared medically fit as per the requirement of the Bank. Such appointment will also be subject to the service and conduct rules of the Bank for such post in the Bank, in force at the time of joining the Bank.
 - ix) In case of multiple application for single post, only the last valid (completed) application will be retained and the application fee/intimation charge paid for other registration will stand forfeited. Multiple appearance by a candidate for a single post in interview will be summarily rejected/candidature cancelled.
 - x) Any legal proceedings in respect of any matter of claim or dispute arising out of this advertisement and/or an application in response thereto can be instituted only in Mumbai and courts/tribunals/ forums at Mumbai only shall have sole and exclusive jurisdiction to try any cause/dispute.

CANVASSING IN ANY FORM WILL BE A DISQUALIFICATION