



Job Description – Insurance Manager

Job Summary: We are looking for a highly motivated candidate with strong execution and communication and skills to join our team. The employee will be in charge of end-to-end client servicing and operations for insurance products. The candidate will report directly to the Director and be an integral part of the organisation. This is a role that has a huge scope for growth in a lot of different verticals. The right candidate can move on-to senior management positions.

About The Company: We are a leading financial planning firm based out of Noida, India, managing over 300 Crores in assets for more than 2000 clients across India and globally. We pride ourselves on delivering end-to-end financial planning solutions tailored to our clients' needs. Please visit our website for more details - [Sanjay Mehta Financial Services | Financial Planner Noida – Towards a Secure Future \(www.smfs.in\)](http://www.smfs.in)

Role Details:

- **Salary:** 3-5 Lakhs (Plus Variable). Negotiable based on skill set and experience.
- **Location:** Sector 132, Noida
- **Joining Date:** Immediately.

Key Responsibilities:

- In charge of end-to-end client servicing operations and related activities for Health, Life, Motor & General Insurance.
- The entire sales pipeline would look something like –
 - Understanding Client Requirements
 - Explaining all suitable options to the client
 - Client Query Resolution
 - Client Onboarding and Insurance Processing
 - Maintaining a healthy MIS
 - Client Claim Assistance
 - Client Servicing for Renewals
- The responsibilities will include but not limited to –
 - Front end work of dealing with clients – Client Relationship Management, Client Servicing
 - Back-end work of dealing with internal operations team and external stakeholders (Insurance companies etc.)
 - Understanding client requirements and working with our senior team on helping them with other financial requirements (eg: mutual funds, FDs, etc.)
- Constantly refine client acquisition processes of the organization and figure out how to improve customer experience.

- Must be a go-getter that enjoys the entire sales pipeline and have excellent communication skills. While there are no sales targets, the candidate must be able to bring in new business on his own.
- Relationship building with existing clients leading to cross selling and referrals.
- Support marketing and sales efforts for client acquisition.
- Support existing operations team to ensure seamless completion of assignments.
- Should have a working knowledge of finance and aptitude to learn more. Good knowledge of personal finance and investment instruments will be advantageous.
- Retain continuous awareness of ongoing work and possess **good organization skills**.
- Frequently replenish job-specific knowledge and apply it on the field.
- Fulfil all company-established policy obligations.

Qualifications & Requirements:

- **Education:** Graduate in any domain (Business/Finance preferred)
- **Experience:** **Minimum 3 years in the Insurance Sector.**
- **Traits:** Extremely motivated, energetic, persuasive, patient, and hard-working; Excellent Communication Skills both written & oral.
- Candidate will be visiting clients so **must be ready for field work**, sometimes at odd hours as well. Should know how to ride a 2-wheeler and have a valid driving license.
- Strong organizational and multitasking abilities.
- Ability to work independently and as part of a team.
- Knowledge of financial products, services, and industry regulations.
- Proficiency in MS Office and CRM software.

Benefits & What We Offer:

- Competitive salary and performance-based bonuses.
- Comprehensive health insurance and term cover benefits.
- Opportunity to work closely with top leadership and gain valuable industry and business insights.
- Professional development and career growth opportunities.
- A supportive and collaborative work environment.
- Regular in-house and outsourced training sessions.

How to Apply:

- Mail cover letter and resume to *careers@smfs.in* with the subject **“Application for Insurance Manager – Your Name”**
- **If you are applying, please read in detail about – the company, the industry and the key responsibilities of your specific role and be ready for a quick interview**

Join Sanjay Mehta Financial Services Private Limited and help us lead our clients towards a secure financial future!