VP - Wealth Sales, Surat

COMPANY	An established wealth management firm in Surat, serving HNI and business families
LOCATION	Surat head office, with client travel to other cities and states
REPORTS TO	The Founders and the firm's advisors
EXPERIENCE	7+ years of selling mutual funds, PMS or AIFs to HNI clients, winning new clients yourself
PAY	Rs 18 to 20 lakh a year fixed, plus incentive on the business you bring in

About the Company

Our client is an established wealth management firm in Surat that works with HNI and business families. It offers mutual funds, PMS, AIFs and other wealth products, and this is the first senior sales leader it is hiring.

The Role in One Line

Go out and bring in new HNI families, from the first meeting to a relationship that lasts years.

This is a sales and business development role, not a portfolio management or operations role. You work with the Founders, you own your numbers, and your results are clearly seen and rewarded.

What You Will Do

- **Win new clients:** build your own pipeline through your network, referrals, events and direct outreach
- **Advise and convert:** understand each family's goals and risk appetite, and recommend the right mix of mutual funds, PMS, AIFs and other products, with the firm's research tools behind you
- **Grow relationships:** turn first investments into long-term relationships that bring repeat money and referrals
- **Own the numbers:** deliver monthly and annual sales and AUM targets
- **Lead by example:** guide and support the relationship managers around you
- **Stay compliant:** follow SEBI rules and the firm's compliance process, and keep the CRM up to date

What You Need

- 7+ years in sales of investment or wealth products, with a clear record of meeting targets
- A hunter: you win new HNI clients every year, not only look after an existing book
- Hands-on experience selling mutual funds, PMS or AIFs to HNI clients
- Your own client relationships. An existing book of about Rs 50 Cr is a plus, not a must
- Graduate in any discipline. MBA in Finance or Marketing preferred
- Comfortable travelling to meet clients in other cities and states
- Clear communication, strong presentation and negotiation skills, and high integrity

A Strong Plus

- You are based in Surat or already know Surat's business families
- NISM certifications for the products you sell (can be completed after joining)
- Experience guiding or leading a small team of relationship managers

Why This Role

- Access to 30+ AMCs and leading PMS and AIF managers
- CRM, research tools and client reporting already in place
- A dedicated operations and compliance team, so you can focus on clients
- A transparent incentive on top of a strong fixed salary
- The first senior sales hire, with a direct line to the Founders

How the Process Works

- A confidential call with Boardroom CXO about the role and your background (the client's name is shared here)
- At least two rounds with the client
- Offer, then you join after your notice period
- Moving from another city? Relocation support, travel and incentive details are open for discussion

What to Send Us

- Your updated CV
- The products you sell today, and roughly how much AUM you manage
- How many new clients you brought in over the last 12 months
- Where you are based now, and whether you would move to Surat
- Your notice period, current CTC and expected CTC

Managed by Boardroom CXO, executive search. Shared in confidence, please do not circulate.