

RECRUITMENT OF HUMAN RESOURCE ON FIXED TERM ENGAGEMENT ON CONTRACTUAL BASIS
FOR VARIOUS DEPARTMENTS IN BANK OF BARODA

BOB/HRM/REC/ADVT/2025/03

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|--|--|
| Online Registration of Application starts from : 26-03-2025 | Last date for Submission of Application & Payment of fees: 15-04-2025 |
| IMPORTANT TO NOTE | |
| a) | The process of Registration of application is complete only when fee is deposited with the Bank through On-line mode on or before the last date for fee payment. Candidates are requested to note down the acknowledgement number and a copy of application form for their future reference. |
| b) | Before applying, candidates should ensure that they fulfill all the eligibility criteria for the post as on the date of eligibility. Short-listing and interview / selection method will be purely provisional without verification of documents. Candidature will be subject to verification of details/documents as and when called by the Bank. |
| c) | Candidates are advised to check Bank's website (Current Opportunities) regularly for details and updates. Call letters/advice, wherever required will be sent by e-mail only. All revisions/corrigendum/modifications (if any) will be hosted on the Bank's website only. |
| d) | All correspondence will be made only on the email ID mentioned by the candidate in their online application form and the same has to be kept active for receiving communication viz., call letters/Interview Dates/advice etc. |
| e) | Post qualification experience below 6 months in any organization & Experience in Clerical cadre would not be considered. |
| f) | Only Candidates willing to serve anywhere in India, should apply. |

1. Details of Positions & Eligibility Criteria (As on 01-03-2025):

| Sn | Position | Vacancies* | Age (in years) | Education Qualification | Post Qualification Experience |
|---|--|------------|--------------------|---|---|
| Department : Defence Banking | | | | | |
| 1 | Deputy Defence Banking Advisor (DDBA) | 1 | Max : 57 | A Bachelor Degree (Graduation) in any discipline from a University recognised by the Govt. Of India./Govt. bodies/AICTE etc. | Retired Officials who held the rank of Col. or Lt. Col. in the Indian Army/Gp Capt Wg Cdr in the Indian Air Force |
| Department : Wealth Management Services (-07- Positions - 145 Vacancies) | | | | | |
| 2 | Private Banker - Radiance Private | 3 | Min- 33 Max-50 | <p>Mandatory:</p> <p>A Degree (Graduation) in any discipline from a University recognized by the Govt. Of India/Govt. bodies/AICTE</p> | <p>Minimum 12 Years of relevant work experience in financial services, Investment advisory or Private banking out of which minimum 8 Years of experience is in Wealth Management or related profiles</p> <p>Excellent knowledge of Private Banking products and services including Investments (Mutual Funds, PMS, AIFs, Structured products). Insurance (Life, Health, General), Banking Products (Assets as well as Liabilities), Trusts as well as advisory services etc.</p> <p>Proven track record of high performance and bespoke relationship management</p> <p>Excellent connections in the respective private banking markets</p> <p>Well-versed in terms of Banking regulations, and reforms and developments/changes across the Wealth Management business spectrum.</p> |
| 3 | Group Head | 4 | Min: 31 Max: 45 | <p>Desirable qualification :</p> <p>2 years full time Post Graduate Degree / Diploma in Management</p> <p>Regulatory certifications e.g. NISM/IRDA</p> | <p>Minimum 10 Years of experience in managing sales in Wealth Management/Retail Banking/ Investments in the financial service industry.</p> <p>Should have managed a large team of Relationship Managers & Team Leads at Regional Level at least for 5 years</p> |
| 4 | Territory Head | 17 | Min:27 Max:40 | | Minimum 6 years of experience in Relationship Management in Wealth Management out of which minimum 2 years as a Team Lead. |
| 5 | Senior Relationship Manager | 101 | Min: 24 Max: 35 | | Minimum 3 Years of Experience as Relationship Manager in Wealth Management with Public Banks / Private Banks / Foreign Banks / Broking Firms / Security Firms / Asset Management Companies. |
| 6 | Wealth Strategist (Investment & Insurance) | 18 | Min: 24 Max: 45 | | <p>Minimum 3 years of experience as a Relationship Manager/ Investment Counsellor in Wealth Management.</p> <p>Excellent knowledge of Investment Products, PMS, AIF, Mutual Fund, Insurance etc.</p> |

| | | | | | |
|---|--------------------------------|---|----------------------|--|---|
| 7 | Product Head - Private Banking | 1 | Min - 24 Max - 45 | Mandatory: A Degree (Graduation) in any discipline from a University recognized by the Govt. Of India/Govt. bodies/AICTE Desirable qualification : 2 years full time Post Graduate Degree / Diploma in Management Regulatory certifications e.g. NISM/IRDA | Minimum -3- years of relevant work experience. Must have experience of handling clients segments having TRV of Rs 15 Cr and above. Must be well versed with the Investment, Insurance, Derivative Products, etc. Ability to co-ordinate with various department like Trade, Forex, Project Finance, Merchant Banking, Syndication, Venture Capital, Private Equity. Must have sound knowledge of the prevalent ecosystem of Private Wealth in the industry. Must be aware of the regulatory guidelines, pertaining to products |
| 8 | Portfolio Research Analyst | 1 | Min - 22 Max - 35 | 2 years full time Post Graduate Degree / Diploma in Management Regulatory certifications e.g. NISM/IRDA | Minimum 1 year of experience as a Research Analyst in Wealth Management with leading Public / Private / Foreign Banks / Broking / Security firms. The candidate should have good command over excel and MIS preparation. Must possess sound communication skill. Must possess requisite knowledge of Wealth Management products. |

* Bank may modify the number of vacancies depending on its requirement.

Credit History: The candidate applying shall ensure that, they maintain a healthy Credit history and shall have a minimum CIBIL score of 650 or above at the time of joining. The minimum credit score will be as per the Banks policy, amended from time to time.

2. Roles & Responsibilities

The detailed roles and responsibilities are appended herewith as Annexure-I. However, Bank reserves the right to modify and/or include any of the KRA(s) for any of the positions from time to time.

3. Reservation in Posts:

| S.N. | Position | SC | ST | OBC | EWS | UR | Total | Out of which | | | |
|------|--|----|----|-----|-----|----|-------|--------------|----|----|----|
| | | | | | | | | OC | VI | HI | ID |
| 1 | Deputy Defence Banking Advisor (DDBA) | -- | -- | -- | -- | 1 | 1 | -- | -- | -- | -- |
| 2 | Private Banker - Radiance Private | -- | -- | 2 | 1 | -- | 3 | -- | -- | -- | -- |
| 3 | Group Head | 1 | 1 | 1 | 1 | -- | 4 | -- | -- | -- | -- |
| 4 | Territory Head | 5 | 3 | 5 | 4 | -- | 17 | 1 | 1 | -- | -- |
| 5 | Senior Relationship Manager | 19 | 22 | 19 | 40 | 1 | 101 | 4 | 4 | 4 | 4 |
| 6 | Wealth Strategist (Investment & Insurance) | 3 | 2 | 5 | 3 | 5 | 18 | -- | -- | -- | -- |
| 7 | Product Head - Private Banking | -- | -- | -- | -- | 1 | 1 | -- | -- | -- | -- |
| 8 | Portfolio Research Analyst | -- | -- | -- | -- | 1 | 1 | -- | -- | -- | -- |

A candidate can apply for only one post/position & one location only (wherever vacancies are notified location wise) advertised for one department / vertical and not more than one application should be submitted by any candidate for one department / vertical. In case of multiple Applications for different positions in same department/vertical, only the latest valid (completed) application will be retained and the application fee/intimation charges paid for the other multiple registration (s) will stand forfeited.

Abbreviations stand for: SC - Scheduled Caste, ST - Scheduled Tribe, OBC - Other Backward Classes, EWS - Economically Weaker Sections, UR- Unreserved, PWD - Persons with Disability, OH-Orthopedically Handicapped, HI - Hearing Impaired, VI- Visually Impaired, ID- Intellectually Disabled.

NOTE:

- Please note that change of category submitted by the applicant will not be permitted at any stage after registration of online application.
- Candidates belonging to OBC category but coming in the 'creamy layer' and/ or if their caste does not find place in the Central List are not entitled to OBC reservation and age relaxation. They should indicate their category as 'GENERAL' or GENERAL (OC/HI/VI/ID) as applicable.
- Benefit of reservation under EWS category is permissible only upon production of an 'Income and Asset Certificate' issued by a Competent Authority in the format prescribed.
- Caste/EWS/PWD certificate issued by Competent Authority on format prescribed by the Government of India will have to be submitted by the candidates applying under SC/ST/OBC/EWS/PWD category, while submitting their application/s.
- The number of vacancies including reserved vacancies mentioned above are provisional and may vary according to the actual requirement of the Bank.
- Reservation for PWD is horizontal and within the overall vacancies for the post.

7. Candidates seeking age relaxation will be required to submit copies of necessary certificate(s) at the time of Interview and/or at any subsequent stage of the recruitment process as and when required by Bank.
8. There is no reservation for Ex-Servicemen in Officers' Cadre.
9. Maximum age indicated is for General category candidates as on the cut-off date. Relaxation in upper age limit will be available as detailed below.

3.1 Relaxation in Upper Age Limit:

| S.N. | Category | Age Relaxation (years) |
|------|--|--|
| 1 | Scheduled Caste | 5 |
| 2 | Scheduled Tribe | 5 |
| 3 | Other Backward Classes (Non-Creamy Layer) | 3 |
| 4 | Persons with Disability | Gen/EWS - 10, OBC - 13, SC/ST - 15 |
| 5 | Ex-servicemen, Commissioned Officers including Emergency Commissioned Officers (ECOs)/ Short Service Commissioned Officers (SSCOs) who have rendered at least 5 years military service and have been released on completion of assignment (including those whose assignment is due to be completed within one year from the last date of receipt of application) otherwise than by way of dismissal or discharge on account of misconduct or inefficiency or physical disability attributable to military service or invalidment | Gen/EWS - 5, OBC - 8, SC/ST - 10 |
| 6 | Persons affected by 1984 riots | 5 |

The aforesaid Relaxation of Upper Age is applicable as per the Reservation Points available for different positions as mentioned above.

4. Remuneration & Location of Posting:

| S.N. | Dept / Vertical | Position | Indicative Compensation | Location of Posting* | | |
|------|--|---------------------------------|-------------------------|----------------------|--------------|------------|
| 1 | Defence Banking | Deputy Defence Banking Advisor | 18 Lakhs P.A. | Jodhpur-1 | | |
| 2 | Wealth Management Services | Private Banker-Radiance Private | 14 Lakhs to 25 Lakhs | Bengaluru-1 | New Delhi-1 | Pune-1 |
| 3 | | Group Head | 16 Lakhs to 28 Lakhs | Bengaluru-1 | Kolkata-1 | Lucknow-1 |
| 4 | | Territory Head | 14 Lakhs to 25 Lakhs | Mumbai-1 | | |
| | | | | Ahmedabad-1 | Bengaluru-1 | Bhopal-1 |
| | | | | Kanpur-1 | Kolkata-1 | Mumbai-7 |
| | | | | Nagpur-1 | New Delhi-2 | Vadodara-1 |
| 5 | | Senior Relationship Manager | 8 Lakhs to 14 Lakhs | Varanasi-1 | | |
| | | | | Ahmedabad-10 | Bengaluru-16 | Chennai-5 |
| | Hyderabad-5 | | | Jaipur-5 | Kolkata-5 | |
| | Mangaluru-2 | | | Mumbai-25 | New Delhi-15 | |
| 6 | Wealth Strategist (Investment & Insurance) | 12 Lakhs to 20 Lakhs | Prayagraj-1 | Surat-5 | Vadodara-5 | |
| | | | Varanasi-2 | | | |
| 7 | Product Head - Private Banking | 10 Lakhs to 16 Lakhs | Bengaluru-2 | Hyderabad-2 | Kolkata-2 | |
| | | | Lucknow-2 | Mumbai-5 | New Delhi-5 | |
| 8 | Portfolio Research Analyst | 6 Lakhs to 10 Lakhs | Mumbai-1 | | | |

*However, the selected candidates are liable to be transferred by the Bank at its absolute discretion to any of the branches/ offices of the Bank or to any place in India.

5. Nature of Employment:

The engagement under the contract is for a period of three (-3-) years or upto attaining the age of -62- years, whichever is earlier and can be subsequently renewed yearly for -1- year each in such a manner that the total engagement period is not more than -5- year, subject to satisfactory performance at the discretion of the Bank (subject to maximum age as -62- years).

6. Application fees:

- Rs.600/- + Applicable Taxes + Payment Gateway Charges for General, EWS & OBC candidates
- Rs.100/- + Applicable Taxes + Payment Gateway Charges for SC, ST, PWD & Women

The candidate is required to pay the non-refundable application fee/Intimation charges irrespective of whether online test is conducted or not and even if the candidate is shortlisted or not for the interview.

A. SELECTION PROCEDURE:

- Selection will be based on short listing and subsequent round of Personal Interview (PI) and/or any other selection method.
- Bank reserves the right to change (cancel/ modify/ add) any of the criteria, method of selection and provisional allotment etc.
- The Bank reserves its right to call candidates in a particular ratio, at its sole discretion, as per the Bank's requirement.
- Adequate number of candidates as decided by the Bank will be shortlisted based on their qualification, experience and overall suitability for Interview. Most suitable candidates will be called for the selection process (PI/any other selection method) and merely applying / being eligible for the post does not entitle the candidate to be eligible for the selection process.
- The qualifying marks in Interview/selection procedure will be decided by the Bank.
- A candidate should qualify in all the processes of selection i.e. Personal Interview and/or other selection method (as the case may be) and should be sufficiently high in the merit to be shortlisted for subsequent process.
- In case more than one candidate scores the cut off marks (common mark at cut off point), such candidates will be ranked according to their age in descending order.
- Bank reserves the right to consider the candidature of the candidate to any other position and/or location mentioned in this advertisement other than for which he/she has applied for, subject to the condition that the candidate fulfil the eligibility criteria prescribed for the position for which the candidate is considered for.
- Bank reserves the right to combine two or more similar position/s as one position, if necessitated.

B. HOW TO APPLY:

Candidates are required to have a valid personal email ID and Contact Number. It should be kept active till completion of this recruitment project. Bank may send call letters for Personal interview and/or Selection Process on the registered Email ID. In case, a candidate does not have a valid personal email ID, he/she should create his/ her new email ID before applying.

a) GUIDELINES FOR FILLING ONLINE APPLICATION:

- i. Candidates should visit Bank's website www.bankofbaroda.in/career.htm and register themselves online in the appropriate Online Application Format, available through the link being enabled on the Careers-> Current Opportunities on the Bank's website & pay the application fee using Debit Card / Credit Card / Internet Banking / UPI etc.
- ii. Candidates need to upload their Bio-data while filling online application. Candidates are also required to upload their scanned photograph, signature and other documents related to their eligibility. Please refer to Annexure II regarding scanning of photograph & signature and upload of documents.
- iii. Candidates are advised to carefully fill in the online application themselves as no change in any of the data filled in the online application will be possible/ entertained. Prior to submission of the online application, candidates are advised to verify the details in the online application form and modify the same, if required. No change is permitted after clicking on **SUBMIT** button. Visually Impaired candidates will be responsible for getting the details filled in/carefully verifying, in the online application and ensuring that the same are correct prior to submission as no change is possible after submission.
- iv. The name of the candidate should be spelt correctly in the application as it appears in the certificates/ mark sheets. Any change/ alteration found, may disqualify the candidature.
- v. An online application which is incomplete in any respect and unsuccessful fee payment will not be considered as valid.
- vi. Candidates shall also be required to submit supporting documents such as Date of Birth Proof, Graduation Certificate, Other Certifications, Experience Letter (any document which substantiates relevant experience), Document showing Break up of CTC, Latest Salary Slip (e.g. Dec 2024/ Jan 2025 / Feb 2025), etc. at the time of submitting the online application form.
- vii. Candidates are advised in their own interest to apply online much 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.
- viii. Bank of Baroda 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 Bank of Baroda.
- ix. Candidate's signature and photograph must be clear and visible.

b) PAYMENT OF FEES:

- i. Application fees and Intimation Charges (Non-refundable) of Rs. 600/-for General /EWS and OBC candidates (plus applicable GST & transaction charges) and Rs.100/- (Intimation charges only) for SC/ ST/PWD/Women candidates (plus applicable GST & transaction charges) will be applicable. Bank is not responsible if any of the candidates makes more than one payment/s and no request for refund of fees shall be entertained.
- 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 / UPI 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 data 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 application form containing fee details, at later stage.

c) **GENERAL INFORMATION:**

- i) The selected candidate will be required to sign an employment contract.
- ii) Candidates should satisfy themselves about their eligibility for the post applied for as on the cut-off date and also ensure that the particulars furnished by him/her are correct in all aspects.
- iii) In case of multiple applications, only the last valid (complete) application will be retained. Multiple appearance by a candidate for a single post in interview will be summarily rejected/candidature cancelled.
- iv) Candidates serving in Govt./Quasi Govt. offices, Public Sector undertakings including Nationalized 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. In case of selection, candidates will be required to produce relieving letter from the employer at the time of taking up the engagement and clearance from the respective authorities, wherever applicable.
- v) 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 without notice.
- vi) Decisions of bank in all matters regarding eligibility, conduct of interviews, 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.
- vii) **Intimations, wherever required will be notified on Bank's website and/ or sent by email and/ sms only to the email ID and mobile number registered in the online application form.** Bank shall not be responsible if the information/intimations do not reach candidates in case of change in the mobile number, email address, technical fault or otherwise, beyond the control of Bank. Candidates are advised to keep a close watch on the authorized Bank's website www.bankofbaroda.in from time to time under **Career section/web page --> Current Opportunities** for latest updates.
- viii) 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.
- ix) A candidate should ensure that the signatures appended by him/her in all correspondence with the bank **should be identical, not in capital letters and there should be no variation of any kind.**
- x) The Bank reserves the right to modify the place of posting as per administrative requirements of the Bank from time to time.

7. **ANNOUNCEMENTS:**

All further Announcements/Addendum or Corrigendum (if any)/details pertaining to this process will only be published/ provided on authorized Bank's website www.bankofbaroda.in from time to time under **Career section/web page → Current Opportunities**. No separate communication/intimation will be sent to the candidates who are not shortlisted/not selected in the process. All notification/communication placed on the Bank's website shall be treated as intimation to all the candidates who have applied for the said project.

If such instances go undetected during the current selection process but are detected subsequently, such disqualification will take place with retrospective affect. **Clarifications/Decisions of the Bank in respect of all matters pertaining to this recruitment would be final and binding on all candidates.**

The Bank reserves the right to reject any application/candidature at any stage or cancel the conduct of interview/ any other selection process or increase/decrease the vacancies for any of the positions, as per the requirement of the Bank or to cancel the Recruitment Process entirely at any stage without assigning any reason.

Mumbai
26.03.2025

Chief General Manager
(HRM & Marketing)

ANNEXURE I

ROLES AND RESPONSIBILITIES

Name of Position - Deputy Defence Banking Advisor

- To assist DBA in expanding Defence Banking business within the area entrusted under his responsibility.
- Liaison & coordination with local Divisions/ Regimental Centres/ Regiments/ Brigade Headquarters/ Medical units etc. as well as local units of other Defence Forces/ Para Military Forces/ State Police for strengthening relationship between the Forces and Bank at the institutional level and increasing the spread of Defence Banking business.
- Servicing of the relationship along with Zones/ Regional Teams.
- Facilitating account opening/ loan campaigns in cantonments and military stations including participation in rallies and advising Zones/ Regions for marketing activities and enhancing visibility of the Bank.
- Provide full support to Zones/ Regions to ensure that they tap maximum accounts of all new recruits in Regimental Centres including pension accounts and terminal benefits of pensioner.
- Arranging cross selling of asset relationship to defence segment customers for achievement of targets allocated to Zones/Regions.
- Coordinating with DBA for marketing all defence schemes of the bank /other institutional business and handling complaints.
- Identifying and obtaining permissions for setting up branches/ATMs/DBUs etc. for increasing visibility of the Bank in defence domain.
- Identifying opportunities for digitisation in Defence and necessary liaison at each level for canvassing institutional business of the Bank.
- Any other roles & responsibilities assigned from time to time

Name of Position - Private Banker-Radiance Private

- Acquisition of new client relationships and development/management of existing Private client relationships(TRV > INR 15 Cr)
- Initiates, develops and retains client relationships while contributing actively to business development and financial goals of the bank
- Responsible for overall revenue and profitability goals across the mapped private client base
- Expected to drive solicitation, presentation, closing and ongoing-management of private banking products across the mapped client base
- Liaises with Private Banking product teams to keep abreast of investment and other product offerings and acts as client's window to the private banking services offered the Bank
- Responsible for up-to-date compliance, KYC and client profile on all mapped clients
- Responsible for creating and owning the Investment Charter/Wealth Plan for all mapped customers based on assessment of risk tolerance, investment horizon and suitability for each client and marketing appropriate products and services basis the charter
- Remains abreast in terms of market trends and developments, customer preferences, and new/innovative products
- Contributes to all aspects of the marketing mix including products development, high operational efficiency and bespoke customer service
- Independently establishes a meeting system to ensure coverage of the mapped client base, completes meeting reports and establishes a robust follow-up system
- Participates, anticipates, enquires, responds, and prepares written presentations and other documents independently
- Expected to achieve high levels of service standards and maximize client satisfaction.
- Any other roles & responsibilities assigned from time to time

Name of Position - Group Head

- Defining and Implementing corporate strategy for the affluent segment in the area in line with corporate vision and plan
- Designing market and sales strategy for the area covering acquisition, management of existing client base, tracking and monitoring sales across business lines in his / her area
- Manage, coach and mentor territory managers in achieving their KRA's and outperforming on the decided benchmarks
- Engage with key clients (Individual and corporates) and help in driving key business deals and transactions
- Build internal and external relationships to help create business development opportunities
- Foster a performance led and ethical culture in the area
- Conducting Individual and Joint Performance reviews for all profiles reporting to him /her
- Responsible for legal and compliance requirement being met in the region
- Any other roles & responsibilities assigned from time to time

Name of Position - Territory Head

- Defining and Implementing marketing and sales strategies for the affluent segment in line with corporate vision and plan
- Designing, implementing and monitoring sales and services for RMs, and CSE's.
- To ensure that sales and service targets are assigned for RMs and CSE's and respective performance against KRA is measured periodically and course correction undertaken if required
- Tracking and reporting sales performance across revenue line including transaction pipeline, acquisition results and market conditions
- Performance Measurement of RMs, Coaching and Mentoring the RMs .
- Manages sales leads being worked across products from identification and initial contact to closure, carefully tracking and actioning leads across the sales cycle
- Conducting research to understand target prospects, setting appointments, meeting key clients and consultatively offering the most appropriate proposition and services
- Generating new business opportunities from internal and external sources, including existing clients and other channels within the bank
- Conducting Individual and Joint Performance reviews for all profiles reporting to the TH
- Ensuring all legal and compliance requirement is met and all ROE's are adhered to
- Keeping up-to-date on products, competition in the financial services space
- Building internal and external relationships and creating business development opportunities through referrals
- Any other roles & responsibilities assigned from time to time

Name of Position - Senior Relationship Manager

- Will be responsible for revenues on Liabilities and wealth management products
- All banking service queries will be passed on to the Customer Service Executive (CSE)
- Review customer wealth needs and proactively engage with the customer to validate the understanding of his needs
- Review product penetration for the assigned client base, identify potential customers who can be sold tailored products to enhance product penetration
- Ensure coverage of all relationships through customer engagements, risk profiling and financial planning
- All loans and cross sell referrals will be passed on to the respective units.
- Organize customer events to enhance customer bonding
- Acquire new customers through converting referral leads
- Ensure that KYC/AML and other compliance norms are strictly adhered to
- Complete all mandatory certifications within 90 days of joining the role and continuously keep selfupdated on changes in products, processes and compliance / regulatory norms
- Provide complete and comprehensive information on products, services, charges etc. proactively to the customer and ensure best services are provided to them
- The candidate should have adequate experience in building and managing relationship with High Net Worth Clients [Clients having a minimum Total Relationship Value (TRV) of `30.00 lakh]
- Any other roles & responsibilities assigned from time to time

Name of Position - Wealth Strategist (Investment & Insurance)

- Driving investment product through sales team
- Educate client about investment & Insurance options and potential risks (Investment & Insurance)
- Research and analyse investments, strategies and market conditions to optimize investment portfolios,
- To combine analytical ability, comprehensive fiscal knowledge and customer service skills to help clients define and reach their financial goals.
- Ownership of the investment & Insurance targets of the cluster/ location that they are mapped to
- AUM increase
- Penetration of client base for creating new investors in MF/investments from existing client base Increase in (Investment & Insurance Products) productivity of RMs
- Ensuring better client experience both by qualitative and quantitative subventions
- Portfolio Monitoring, rebalancing & reviews
- Any other roles & responsibilities assigned from time to time

Name of Position - Product Head - Private Banking

- Must enable Bank to develop Private Banking segment.
- Planning and executing strategies along with seniors to scale up business through this segment.
- Co-ordinating with various department like, Trade & Forex, Corporate Finance, Retail Banking etc providing necessary support to the clients, and team at the ground.
- Co-ordinating with the departments for syndicate loan, working capital, IPO etc.
- Studying and adopting best practices of the industry to scale up the segment
- Any other roles & responsibilities assigned from time to time

Name of Position - Portfolio Research Analyst

- Gathering the data from the various sources for providing support to the team members.
- Assisting the team to prepare data analytics and research work.
- Analyse the data of Mutual Fund, creating required MIS, information pertaining to Mutual Fund schemes and Insurance
- Any other roles & responsibilities assigned from time to time

ANNEXURE II

GUIDELINES FOR UPLOADING THE PHOTOGRAPH, SIGNATURE & OTHER DOCUMENTS

The following documents are required to be uploaded by the candidate:

- Resume (PDF)
- DOB Proof: 10th marksheet/ certificate (PDF)
- Educational Certificates: Relevant Mark-Sheets/Certificate (PDF) (All Educational Certificates should be scanned in a single PDF file)
- Work experience certificates (PDF) if applicable (PDF)
- Caste/ Category Certificate (PDF) if applicable (PDF)
- PWD certificate, if applicable (PDF)

Before applying online, a candidate will be required to have scanned (digital) image of the above documents as per the specifications given below:-

- All Documents must be in PDF format.
- Page size of the document to be A4.
- Size of the file should not be exceeding 500 KB.
- 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 500KB, then adjust the setting of the scanner such as the DPI resolution, no. of colors etc., during the process of scanning. Please ensure that Documents uploaded are clear and readable.

GUIDELINES FOR SCANNING THE PHOTOGRAPH (4.5cmX3.5cm) & SIGNATURE:

Before applying online, a candidate will be required to have a scanned (digital) image of his/ her photograph and signature as per the specifications given below:-

(i) Photograph Image :-

- Photograph must be a recent passport style colour picture.
- Make sure that the picture is in colour, taken against a light coloured, preferably white background.
- Look straight at the camera with a relaxed face.
- If the picture is taken on a sunny day, have the sun behind you, or place yourself in the shade, so that you are not squinting and there are no harsh shadows.
- If you have to use flash, ensure there's no "red-eye".
- If you wear glasses make sure that there are no reflections and your eyes can be clearly seen.
- Caps, hats and dark glasses are not acceptable, religious headwear is allowed but it must not cover your face.
- Dimensions 200 x 230 pixels (preferred)
- Size of the file should be between 20kb – 50kb.
- Ensure that the size of the scanned image is not more than 50kb. If the size of the file is more than 50kb, then adjust the settings of the scanner such as the DPI resolution, no of colours etc during the process of scanning.

(ii) Signature Imaging :-

- The applicant has to sign on white paper with Black Ink Pen.
- The signature must be signed only by the applicant and not by any other person.
- The signature will be used to put on the Call letter and wherever necessary.
- If the applicant's signature on the answer script at the time of the examination does not match the signature on the Call letter, the applicant will be disqualified.
- Dimensions 140 x 60 pixels (preferred)
- Size of the file should be between 10kb – 20kb.
- Ensure that the size of the scanned image is not more than 20kb.
- **Signature in CAPITAL LETTERS shall NOT be accepted**

(iii) Guidelines for scanning of photograph, signature & documents :-

1. Set the scanner resolution to a minimum of 200 dpi (dots per inch).
2. Set the colour to True Colour
3. Crop the image in the scanner to the edge of the photograph/ signature, then use the upload editor to crop the image to the final size (as specified above).
4. The image file should be JPG or JPEG format. An example file name is: image01.jpg or image01.jpeg. Image dimensions can be checked by listing the folder files or moving the mouse over the file image icon.
5. Image dimensions can be checked by listing the folder/ files or moving the mouse over the file image icon.
6. Candidates using MSWindows/ MSOffice can easily obtain photo and signature in .jpeg format not exceeding 50kb and 20kb respectively by using MSPaint or MSOffice Picture Manager. Scanned photograph and signature in any format can be saved in .jpg format by using 'Save As' option in the File menu and size can be reduced below 50kb (photograph) & 20kb (signature) by using crop and then resize option (Please see point (i) & (ii) above for the pixel size) in the 'Image' menu. Similar options are available in other photo editor also.
7. If the file size and format are not as prescribed, an error message will be displayed.

8. While filling in the Online Application Form, the candidate will be provided with a link to upload his photograph and signature.

PROCEDURE FOR UPLOADING THE PHOTOGRAPH, SIGNATURE & DOCUMENTS :-

- (i) There will be separate links for uploading Photograph, Signature & Documents.
- (ii) Click on the respective link 'Upload'.
- (iii) Browse and select the location where the scanned photograph, signature or document files has been saved.
- (iv) Select the file by clicking on it & click the 'Upload' button.
- (v) Click Preview to confirm the document is uploaded and accessible properly before submitting the application. If the file size and format are not as prescribed, an error message will be displayed.
- (vi) Once uploaded/ submitted, the Documents uploaded cannot be edited/ changed.
- (vii) After uploading the photograph/ signature in the online application form candidates should check that the images are clear and have been uploaded correctly. In case the photograph or signature is not prominently visible, the candidate may edit his/ her application and re-upload his/ her photograph or signature, prior to submitting the form. If the face in the photograph or signature is unclear the candidate's application may be rejected.

Your Online Application will not be registered unless you upload your photograph, signature & documents as specified.

Note :-

1. In case the face in the photograph or signature or documents is unclear, the candidate's application may be rejected.
2. After registering online, candidates are advised to take a printout of their system generated online application forms.

In case, the photograph or signature or documents is/ are not prominently visible, the candidate may edit his/her application and re-load his/ her photograph or signature or documents, prior to submitting the form.

ANNEXURES - FORMS

FORM OF CERTIFICATE TO BE PRODUCED BY A CANDIDATE BELONGING TO SCHEDULED CASTE OR SCHEDULED TRIBE IN SUPPORT OF HIS / HER CLAIM.

1.This is to certify that Sri / Smt / Kum* _____ son / daughter*
of _____ of village / town* _____ in
District / Division* _____ of the State / Union Territory* _____ belongs to the
_____ Caste/Tribe* which is recognized as a Scheduled Caste/ Scheduled Tribe* under :

- * The Constitution (Scheduled Castes) Order, 1950 ;
- * The Constitution (Scheduled Tribes) Order, 1950 ;
- * The Constitution (Scheduled Castes)(Union Territories)Orders, 1951 ;
- * The Constitution (Scheduled Tribes)(Union Territories)Order, 1951 ;

[as amended by the Scheduled Castes and Scheduled Tribes lists Modification) Order,1956; the Bombay Reorganisation Act, 1960; the Punjab Reorganisation Act 1966, the State of Himachal Pradesh Act, 1970, the North-Eastern Areas (Reorganisation)Act, 1971, the Constitution (Scheduled Castes and Scheduled Tribes) Order (Amendment) Act,1976, The State of Mizoram Act, 1986, the State of Arunachal Pradesh Act, 1986 and the Goa, Daman and Diu (Reorganization) Act, 1987.],:

- * The Constitution (Jammu and Kashmir) Scheduled Castes Order,1956 ;
- * The Constitution (Andaman and Nicobar Islands) Scheduled Tribes Order, 1959 as amended by the Scheduled Castes and Scheduled Tribes Orders (Amendment) Act, 1976 ;
- * The Constitution (Dadra and Nagar Haveli) Scheduled Castes Order, 1962 ;
- * The Constitution (Dadra and Nagar Haveli) Scheduled Tribes Order, 1962 ;
- * The Constitution (Pondicherry) Scheduled Castes Order 1964;
- * The Constitution (Uttar Pradesh) Scheduled Tribes Order,1967;
- * The Constitution (Goa, Daman and Diu) Scheduled Castes Order, 1968 ;
- * The Constitution (Goa, Daman and Diu) Scheduled Tribes Order, 1968 ;
- * The Constitution (Nagaland) Scheduled Tribes Order, 1970 ;
- * The Constitution (Sikkim) Scheduled Castes Order, 1978 ;
- * The Constitution (Sikkim) Scheduled Tribes Order, 1978 ;
- * The Constitution (Jammu and Kashmir) Scheduled Tribes Order, 1989 ;
- * The Constitution (Scheduled Castes) Orders (Amendment)Act, 1990;
- * The Constitution (ST) Orders (Amendment) Ordinance, 1991 ;
- * The Constitution (ST) Orders (Second Amendment) Act,1991 ;
- * The Constitution (ST) Orders (Amendment) Ordinance, 1996;
- * The Scheduled Caste and Scheduled Tribes Orders (Amendment) Act 2002;
- *The Constitution (Scheduled Castes) Order (Amendment) Act, 2002;
- *The Constitution (Scheduled Caste and Scheduled Tribes) Order (Amendment) Act, 2002;
- *The Constitution (Scheduled Caste) Order (Second Amendment) Act, 2002].

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:: 2 ::

2. Applicable in the case of Scheduled Castes / Scheduled Tribes persons , who have migrated from one State / Union Territory Administration.

This certificate is issued on the basis of the Scheduled Castes / Scheduled Tribes* Certificate issued to Shri / Smt / Kumari* _____ Father /Mother* of Sri / Smt / Kumari* _____ of village / town _____ in District/Division* _____ of the State/Union Territory* _____ who belong to the _____ Caste / Tribe* which is recognized as a Scheduled Caste/Scheduled Tribe* in the State/Union Territory* issued by the _____ [Name of the authority] vide their order No. _____ dated _____.

3. Shri/Smt/Kumari* _____ and/or* his/her* family ordinarily reside(s) in village/town* _____ of _____ District / Division* of the State / Union Territory* of _____

Signature _____

Designation _____

Place: [With seal of Office]
Date : State/Union Territory

Note : The term "Ordinarily resides" used here will have the same meaning as in Section 20 of the Representation of the Peoples Act, 1950.

* Please delete the words which are not applicable.
Delete the paragraph which is not applicable.

List of authorities empowered to issue Caste / Tribe Certificates:

1. District Magistrate / Additional District Magistrate / Collector / Deputy Commissioner / Additional Deputy Commissioner / Deputy Collector/I Class Stipendiary Magistrate / Sub-Divisional Magistrate / Extra-Asst. Commissioner / Taluka Magistrate / Executive Magistrate.
2. Chief Presidency Magistrate/ Additional Chief Presidency Magistrate / presidency Magistrate.
3. Revenue Officer not below the rank of Tehsildar.
4. Sub-Divisional Officers of the area where the candidate and / or his family normally resides.

Note : The Certificate is subject to amendment/modification of Scheduled Castes and Scheduled Tribes lists from time to time

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FORM OF CERTIFICATE TO BE PRODUCED BY
OTHER BACKWARD CLASSES APPLYING FOR APPOINTMENT
TO POSTS UNDER THE GOVERNMENT OF INDIA

This is to certify that Sri / Smt. / Kumari _____ son/daughter of _____ of village/Town _____ District/Division _____ in the State/ Union Territory _____ belongs to the _____ community which is recognized as a backward class under the Government of India, Ministry of Social Justice and Empowerment's Resolution No. _____ dated _____*. Shri/Smt./Kumari _____ and/or his/her family ordinarily reside(s) in the _____ District/Division of the _____ State/Union Territory. This is also to certify that he/she does not belong to the persons /sections (Creamy Layer) mentioned in column 3 of the Schedule to the Government of India, Department of Personnel & Training OM No.36012/22/93- Estt.[SCT], dated 8-9-1993**.

Dated : _____ District Magistrate

Deputy Commissioner etc.

Seal

* - the authority issuing the certificate may have to mention the details of Resolution of Government of India, in which the caste of the candidate is mentioned as OBC.

** - As amended from time to time.

Note:- The term "Ordinarily" used here will have the same meaning as in Section 20 of the Representation of the People Act, 1950.

The Prescribed proforma shall be subject to amendment from time to time as per Government of India Guidelines.

FORM-I

Disability Certificate

(In cases of amputation or complete permanent paralysis of limbs and in cases of blindness)
(Prescribed proforma subject to amendment from time to time)

(NAME AND ADDRESS OF THE MEDICAL AUTHORITY ISSUING THE CERTIFICATE)

Recent PP size
Attested
Photograph
(Showing face
only) of the
person with
disability

Certificate No. :

Date :

This is to certify that I have carefully examined

Shri/Smt./Kum. _____ son/wife/daughter of Shri

_____ Date of Birth (DD / MM / YY) ____ ____

Age _____ years, male/female Registration No. _____ permanent resident of House

No. _____ Ward/Village/Street _____ Post Office

_____ District _____ State _____, whose photograph is affixed above,

and am satisfied that :

(A) he/she is a case of :

- Iocomotor disability
- Blindness

(Please tick as applicable)

(B) The diagnosis in his/her case is _____

(A) He/She has _____% (in figure) _____ percent (in words) permanent physical impairment/blindness in relation to his/her _____ (part of body) as per guidelines (to be specified)

2. The applicant has submitted the following documents as proof of residence :-

| Nature of Document | Date of Issue | Details of authority issuing certificate |
|--------------------|---------------|--|
| | | |

(Signature and Seal of Authorised Signatory of notified Medical Authority)

Signature/Thumb
impression of the
person in whose
favour disability
certificate is
issued.

FORM - II
Disability Certificate
(In case of multiple disabilities)
(Prescribed proforma subject to amendment from time to time)
(NAME AND ADDRESS OF THE MEDICAL AUTHORITY ISSUING THE CERTIFICATE)

Recent PP size
 Attested
 Photograph
 (Showing face
 only) of the
 person with
 disability

Certificate No. :

Date :

This is to certify that we have carefully examined

Shri/Smt./Kum. _____ son/wife/daughter of Sh

_____ Date of Birth (DD / MM / YY) _____

Age _____ years, male/female _____ Registration No. _____ permanent resident

House No. _____ Ward/Village/Street _____ Po

Office _____ District _____ State _____, whose photograph is affix

above, and are satisfied that :

(A) He/she is a Case of Multiple Disability. His/her extent of permanent physical impairment/disability has been evaluated as per guidelines (to be specified) for the disabilities ticked below, and shown against the relevant disability in the table below :

| Sr. No. | Disability | Affected Part of Body | Diagnosis | Permanent physical impairment/mental disability (in %) |
|---------|----------------------|-----------------------|-----------|--|
| 1 | Locomotor disability | @ | | |
| 2 | Low vision | # | | |
| 3 | Blindness | Both Eyes | | |
| 4 | Hearing impairment | £ | | |
| 5 | Mental retardation | X | | |
| 6 | Mental-illness | X | | |

(B) In the light of the above, his/her over all permanent physical impairment as per guidelines (to be specified), is as follows

In figures :- _____ percent

In words :- _____ percent

2. This condition is progressive/non-progressive/likely to improve/not likely to improve.

3. Reassessment of disability is :

(i) not necessary,

Or

(ii) is recommended / after _____ years _____ months, and therefore this certificate shall be valid till (DD / MM / YY) _____

@ - e.g. Left/Right/both arms/legs

- e.g. Single eye / both eyes

£ - e.g. Left / Right / both ears

4. The applicant has submitted the following documents as proof of residence :-

| Nature of Document | Date of Issue | Details of authority issuing certificate |
|--------------------|---------------|--|
| | | |

5. Signature and Seal of the Medical Authority

| | | |
|-------------------------|-------------------------|------------------------------|
| | | |
| Name and seal of Member | Name and seal of Member | Name and seal of Chairperson |

Signature/Thumb
impression of the
person in whose
favour disability
certificate is issued.

FORM - III
Disability Certificate

(In cases other than those mentioned in Form I and II)

(Prescribed proforma subject to amendment from time to time)

(NAME AND ADDRESS OF THE MEDICAL AUTHORITY ISSUING THE CERTIFICATE)

| |
|--|
| Recent PP size Attested Photograph (Showing face only) of the person with disability |
|--|

Certificate No. :

Date :

This is to certify that I have carefully examined

Shri/Smt./Kum. _____ son/wife/daughter of Shri

_____ Date of Birth (DD / MM / YY) ____ ____

Age _____ years, male/female _____ Registration No. _____ permanent resident of

House No. _____ Ward/Village/Street _____ Post

Office _____ District _____ State _____, whose photograph is affixed

above, and am satisfied that he/she is a Case of _____ disability. His/her extent of percentage

physical impairment/disability has been evaluated as per guidelines (to be specified) and is shown against the relevant

disability in the table below :

| Sr. No. | Disability | Affected Part of Body | Diagnosis | Permanent physical impairment/mental disability (in %) |
|---------|----------------------|-----------------------|-----------|--|
| 1 | Locomotor disability | @ | | |
| 2 | Low vision | # | | |
| 3 | Blindness | Both Eyes | | |
| 4 | Hearing impairment | £ | | |
| 5 | Mental retardation | X | | |
| 6 | Mental-illness | X | | |

(Please strike out the disabilities which are not applicable.)

2. The above condition is progressive/non-progressive/likely to improve/not likely to improve.

3. Reassessment of disability is :

(i) not necessary,

Or

(ii) is recommended / after _____ years _____ months, and therefore this certificate shall be valid till (DD / MM / YY) _____

@ - e.g. Left/Right/both arms/legs

- e.g. Single eye / both eyes

£ - e.g. Left / Right / both ears

4. The applicant has submitted the following documents as proof of residence :-

| Nature of Document | Date of Issue | Details of authority issuing certificate |
|--------------------|---------------|--|
| | | |

(Authorised Signatory of notified Medical Authority)
(Name and Seal)

Countersigned

{Countersignature and seal of the
CMO/Medical Superintendent/Head of
Government Hospital, in case the
certificate is issued by a medical
authority who is not a government
servant (with seal)}

Signature/Thumb
impression of the
person in whose
favour disability
certificate is issued.

FORM OF CERTIFICATE TO BE PRODUCED BY CANDIDATE APPLYING UNDER
ECONOMICALLY WEAKER SECTION

Government of
(Name & Address of the authority issuing the certificate)

INCOME & ASSET CERTIFICATE TO BE PRODUCED BY ECONOMICALLY WEAKER SECTIONS

Certificate No. _____

Date: _____

VALID FOR THE YEAR _____

This is to certify that Shri/Smt./Kumari _____ son/daughter/wife of _____ permanent resident of _____, Village, Street _____ Post Office _____ District in the State / Union Territory _____ Pin Code _____ whose photograph is attested below belongs to Economically Weaker Sections, since the gross income* of his/her 'family**' is below Rs. 8 lakh (Rupees Eight Lakh only) for the financial year _____. His/her family does not own or possess any of the following assets***:

- I. 5 acres of agricultural land and above;
- II. Residential flat of 1000 sq. ft. and above;
- III. Residential plot of 100 sq. yards and above in notified municipalities;
- IV. Residential plot of 200 sq. yards and above in areas other than the notified municipalities.

2. Shri/Smt./Kumari _____ belongs to the _____ caste which is not recognized as a Scheduled Caste, Scheduled Tribe and Other Backward Classes (Central List).

Signature with Seal of Office _____
Name _____
Designation _____

Recent Passport size
attested photograph
of the applicant

*Note1: Income covered from all sources i.e. salary, agriculture, business, profession, etc.

**Note 2: The term 'Family' for this purpose include the person, who seeks the benefit of reservation, his/her parents and siblings below the age of 18 years as also his/her spouse and children below the age of 18 years

***Note 3: The property held by a 'Family' in different locations or different places/cities have been clubbed while applying the land or property hold test to determine the EWS status