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State Bank of India
Central Recruitment & Promotion Department
Corporate Centre, Mumbai
Email: crpd@sbi.co.in

AWARDS & ACCOLADES

SBI was awarded the **"Company of the Year Award – 2023"** by the **ET Awards** for Corporate Excellence 2023 on 15.03.2024.



SBI Featured among the **top 25 strongest Brands globally** for 2024 – Brand Finance Annual Report on most valuable and **Global Brands – Global 500 2024.** *(19.01.2024)*



SBI Chairman was honoured with the **Indian of the year award (IOTY) 2023** in the business category at **CNN – News 18 awards** on 10.01.2024.



SBI was recognized as the **"Best Bank in India"** for the year 2023 by **Global Finance Magazine** at its 30th Annual Best Banks Awards event. The award ceremony took place in Marrakech, **Morocco** during the occasion of 2023 IMF/WB Annual Meetings held from 9th to 15th October 2023.



Most trusted BFSI Brands 2023-24, on 21.06.2023, by the Economic Times Group.



Won 4 **awards** at **DIGIXX 2024 Summit & Awards** on 22.03.2024 at New Delhi.

- Brand of the Year
- Best Influencer marketing Campaign
- best use of Social Media
- PR/ Online Reputation Management



SBI received the **"Iconic Banking Brand"** award at the 3rd edition of **Navbharat BFSI 2023** presented by the Honorable Speaker of Maharashtra Legislative Assembly on 13.01.2024



SBI received the Top Performing Bank award under **EASE 5.0** of PSBs Reforms Agenda.



Dunn & Bradstreet Award in the Category – **PSU Banks over 4 lacs crore assets** size at the PSU & Government Summit 2023 on 07th October 2023.



SBI received the **"India's Best Annual Report Awards 2023"** award



SBI received the **"ICAI Awards for Excellence in Financial Reporting"** award

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ENGAGEMENT OF SPECIALIST CADRE OFFICERS ON CONTRACTUAL BASIS
(ADVERTISEMENT NO: CRPD/SCO/2024-25/09)
ONLINE REGISTRATION OF APPLICATION & PAYMENT OF FEES: FROM 19.07.2024 TO 08.08.2024

State Bank of India invites Online application from Indian citizen for appointment to the following Specialist Cadre Officers posts. Candidates are requested to apply Online through the link given on Bank's website https://bank.sbi/careers

1. The process of Registration is complete only when fee is deposited with the Bank through Online mode on or before the last date for payment of fee.
2. **Before applying, candidates are requested to ensure that they fulfil the eligibility criteria for the post as on the date of eligibility.**
3. Candidate can apply for more than one post.
4. Candidates are required to upload all required documents (brief resume, ID proof, age proof, caste certificate, PwBD Certificate (if applicable), educational qualification, experience etc.) failing which their application/candidature will not be considered for shortlisting/ interview.
5. Short listing will be provisional without verification of documents. Candidature will be subject to verification of all details/ documents with the original when a candidate reports for interview (if called).
6. In case a candidate is called for interview and is found not satisfying the eligibility criteria (Age, Educational Qualification and Experience etc.) he/ she will neither be allowed to appear for the interview nor be entitled for reimbursement of any travelling expenses.
7. Candidates are advised to check Bank's website https://bank.sbi/careers regularly for details and updates (including the list of shortlisted/ selected candidates). The Call (letter/ advice), where required, will be sent by e-mail only (no hard copy will be sent).
8. ALL REVISIONS/ CORRIGENDUM (IF ANY) WILL BE HOSTED ON THE BANK'S WEBSITE ONLY.
9. In case more than one candidate scores same marks as cut-off marks in the final merit list (common marks at cut-off point), such candidates will be ranked in the merit according to their age in descending order.
10. Hard copy of application & other documents not to be sent to this office.

A: DETAILS OF POSTS/VACANCIES/ELIGIBILITY CRITERIA/SUGGESTED PLACE OF POSTING:

Sl. No.	Name of Post @	Vacancies							PwBD (Horizontal vacancy)				Age as on 01/04/2024 (Years) #		Suggested place of posting ++
			SC	ST	OBC	EWS^	UR	Total	VI	HI	LD	D&E$	Min	Max	
1	Central Research Team (Product Lead)	Backlog	--	--	--	--	--	--	1	--	1	--	30	45	Mumbai
		Regular	--	--	--	--	2	2	1	--	--	--			
2	Central Research Team (Support)	Backlog	--	--	--	--	--	--	2	--	--	--	25	35	
		Regular	--	--	--	--	2	2	1	--	--	--			
3	Project Development Manager (Technology)	Backlog	--	--	--	--	--	--	1	--	--	--	25	40	
		Regular	--	--	--	--	1	1	1	--	--	--			
4	Project Development Manager (Business)	Backlog	--	--	--	--	--	--	1	--	--	--	30	40	
		Regular	--	--	--	--	2	2	1	--	--	--			
5	Relationship Manager	Backlog	47	52	24	--	--	123	8	7	8	6	23	35	Circles
		Regular	24	11	38	15	62	150	2	2	1	1			
6	VP Wealth +	Backlog	16	9	18	--	--	43	2	2	--	1	26	42	
		Regular	99	45	155	60	241	600	6	6	6	6			
7	Relationship Manager - Team Lead	Backlog	5	5	1	--	--	11	2	1	1	--	28	42	
		Regular	3	1	5	2	10	21	1	--	--	--			
8	Regional Head	Backlog	1	0	3	--	--	4	1	--	--	--	35	50	
		Regular	--	--	--	--	2	2	1	--	--	--			
9	Investment Specialist	Regular	4	2	7	3	14	30	1	1	--	--	28	42	
10	Investment Officer	Backlog	9	3	14	--	--	26	1	1	3	--	28	40	
		Regular	3	1	5	2	12	23	1	--	--	--			

Abbreviation: UR- Unreserved, OBC-Other Backward Class-Non-Creamy Layer, SC-Scheduled Caste, ST-Scheduled Tribe, EWS-Economically Weaker Section, VI-Visually Impaired, HI-Hearing Impaired, LD-Locomotive Disability, $ D&E Include PwBDs as mentioned in Sec 34 (1) clause (d) & (e) of The Rights of Persons with Disabilities Act 2016

@ A Candidate can apply for more than one post

^ EWS vacancies are tentative and subject to further directives of Government of India & outcome of any litigation

Relaxation in upper age for reserved categories is as per GOI guidelines.

+ Earlier known as Senior Relationship Manager

++ For Post Sl. No. 5 & 6 Candidates to provide 3 options of Circles for place of posting. However, the Bank reserves the right to transfer the services of such OECs (Officers Engaged on Contract) to any of the offices of State Bank of India in India or to depute to any of its associates/subsidiaries or any other organization depending upon the exigencies of service. Request for posting/transfer to a specific place/office may not be entertained.

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IMPORTANT POINTS

i. The number of vacancies including reserved vacancies mentioned above are **provisional and may vary** according to the actual requirement of the Bank.

ii. The educational qualification prescribed for various posts are the minimum. Candidate **must possess the qualification** and **relevant full-time experience** as on specified dates.

iii. Candidate belonging to reserved category including Person with Benchmark Disabilities (PwBD) for whom no reservation has been mentioned are free to apply for vacancies announced for General category provided they fulfil all the eligibility criteria applicable to General category.

iv. The reservation under various categories will be as per prevailing Government of India guidelines.

v. PwBD candidate should produce a certificate issued by a competent authority as per the Government of India Guidelines.

vi. Reservation for PwBD candidates is horizontal and is included in the vacancy of the respective parent category.

vii. Vacancies reserved for OBC Category are available to OBC candidates belonging to **'Non-creamy Layer'**. Candidates belonging to OBC category but coming in creamy layer are not entitled to any relaxation/reservation available to OBC category. They should indicate their category as General or General (LD/VI/HI/d&e), as the case may be.

viii. OBC category candidate should submit the **OBC certificate on format prescribed by Govt. of India**, having Non-Creamy Layer clause issued during the period 01.04.2024 to the date of interview. **Non-production of OBC (Non-creamy layer) certificate in format prescribed by Govt. of India may lead to cancellation of candidature at any point of time.**

ix. Caste certificate issued by Competent Authority on format prescribed by the Government of India will have to be submitted by the SC/ST/ OBC (Non-creamy layer) candidates. **Non-production of caste certificate in format prescribed by Govt. of India may lead to cancellation of candidature at any point of time.**

x. Reservation for Economically Weaker section (EWS) in recruitment is governed by Office Memorandum No. 36039/1/2019-Estt (Res) dtd. 31.01.2019 of Department of Personnel & Training, Ministry of Personnel (DoPT), Public grievances & Pensions, Government Of India. Disclaimer: EWS vacancies are tentative and subject to further directives of Government of India and outcome of any litigation. The appointment is provisional and is subject to the Income & Asset certificate being through the proper channel.

xi. Benefit of Reservation under EWS category can be availed of only upon production of **"Income and Asset Certificate" issued by the competent authority on the format prescribed by Govt. of India** for the relevant financial year as per the extant DoPT guidelines on or before the closure of online application date.

xii. The EWS candidates should note that in case, they are not in possession of "Income & Asset Certificate" for the FY2023-24 as per the extant DoPT guidelines on or before the closure of online application date, such candidates should apply under "General Category" only.

xiii. The relevant experience certificate from the employer must contain specifically that the candidate has experience in that related field as required. **Without the production of proper experience certificate, Bank has right to cancel the candidature at any point of time.**

xiv. Bank reserves the right to cancel the recruitment process entirely or for any particular post at any stage.

xv. Only those persons with benchmark disabilities would be eligible for reservation under PwBD category. "**Benchmark disability**" means a person with not less than 40% of a specified disability where specified disability has not been defined in measurable terms and includes the persons with disability, where disability has been defined in a measurable term, as certified by the certifying authority. Backlog vacancies reserved for PwBD would be filled by a person with benchmark disability in the respective category. If no suitable person from that category is available, such backlog would be filled up by interchange among other eligible PwBD candidates subject to the posts having been identified suitable for such disabilities.

xvi. **TRANSFER POLICY:** The bank reserves the right to transfer the services of such officers engaged on contract (OECs) to any of the offices of State Bank of India in India or to depute to any of its associates/subsidiaries or any other organization depending upon the exigencies of service. **Any request for posting/transfer to a specific place/office may not be entertained.**

xvii. **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 marks at cut-off point), such candidates will be ranked according to their age in descending order, in the merit.

xviii. Mere fulfilling minimum qualification and experience will not vest any right 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 and called 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.**

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B. REMUNERATION & CONTRACT PERIOD:

Sl. No.	Name of Post	CTC Upper Range^ (Rs In Lakhs)	Variable Pay/PLP**	Contract Period
1	**Central Research Team (Product Lead)**	61.00	Eligible for Performance Linked Pay and Annual Increment based on the performance rating measured as per Bank's Policy (at Present Bandwidth for PLP 0% to 35% and Increment 0% to 25%).	**5 Years** (First year will be Probation period)
2	**Central Research Team (Support)**	20.50		
3	**Project Development Manager (Technology)**	30.00		
4	**Project Development Manager (Business)**	30.00		
5	**Relationship Manager**	30.00	Eligible for Performance Linked Pay and Annual Increment based on the performance rating measured as per Bank's Policy (at Present Bandwidth for PLP 0% to 45% and Increment 0% to 25%).	
6	**VP Wealth**	45.00		
7	**Relationship Manager - Team Lead**	52.00		
8	**Regional Head**	66.50		
9	**Investment Specialist**	44.00		
10	**Investment Officer**	26.50		

^ Annual CTC is negotiable and will depend upon experience & current emoluments of candidates in the present employment & place of posting.
**** Annual CTC upper range for fixed + Variable Pay/PLP based on Performance Rating + Other Perks**

C. DETAILS OF THE REQUIREMENTS OF EDUCATIONAL QUALIFICATIONS/POST-QUALIFICATION EXPERIENCES/SPECIFIC SKILLS /JOB PROFILE/KEY RESPONSIBILITY AREA ETC:

1. Post: Central Research Team (Product Lead)

Educational Qualification (As on 01.04.2024)	**Mandatory:** MBA/PGDM/PGDBM from Government recognized University or Institution or CA/CFA **Preferred Qualification:** Preferred: NISM Investment Advisor/Research Analyst Certificate/CFP/NISM 21A or 21B
Post-Qualification Experience (As on 01.04.2024)	➢ **Mandatory**: Post Qualification Experience of Minimum 5 years in Equity Research/Products experience in Wealth Management/AMC (Mutual Fund)/Banks. ➢ **Preferred**: i. Minimum 8 years' experience in Equity/Fixed Income Research/MF Research Analytics ii. Excellent Knowledge on local and global economic trends iii. Excellent Knowledge on local Primary/Secondary Equity Markets/Fixed Income and on PMS/AIF/MF/ Structured Products schemes in India. iv. Experience in creating views and research-based publication on capital Market / sector trends. v. Proficiency in using Excel / Modelling techniques / Bloomberg / Reuters /Morning Star / CRISIL data bases. vi. Flair for equity, understanding of all exchange traded products including bonds, INVIT, MLDs, REITs, Section 54 EC Bonds.
Specific Skills required (if any)	Nil
Job profile	❖ The Official would work closely with Head - (Product, Investment & Research) and would be responsible for running program of wealth products and liaise with Market data Aggregators and Research providers. ❖ The Official will be responsible to prepare product notes, market updates, investment outlook and evaluate latest product offering in addition handling all queries related to products. ❖ He will also require to prepare notes related to products.
Key Responsibility Areas	The Official would work closely with Head - (Product, Investment & Research) and conduct the following activities: ❖ Understand the current trends of wealth products. ❖ Create forward looking view on equity market and specific sectors. ❖ Give regular updates on developments in equity market. ❖ Analyse various PMS/AIF/MF/Structured Products/ scheme offerings and conduct due diligence prior to approval. ❖ Liaise with other departments and outside agencies for equity markets. ❖ Analytics of Equity PMS/AIF/Other wealth product and Client portfolios. ❖ Liaise with Market data aggregators and research report providers. ❖ Regular interaction with Investment and RM teams. ❖ Any other matter, as may be entrusted by the Bank from time to time.

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2. **Post: Central Research Team (Support)**	
Educational Qualification (As on 01.04.2024)	**Mandatory**: Graduate/Post-Graduate in Commerce/Finance/Economics/Management/Mathematics/Statistics from Government recognized University or Institution.
Post-Qualification Experience (As on 01.04.2024)	**Mandatory**: Post Qualification Experience of Minimum 3 years in financial services providing support to Research / Publications department.
Specific Skills required (if any)	**Preferred**: i. Candidate should be proficient in Microsoft Excel, Power point, Word, Outlook. ii. Candidate should have inclination to undertake research by reading various reports or websites. iii. 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.
Job profile	Role will include creating and updating excel worksheets related to: Macro Economy, Stock & Sector research, Fixed Income research, creating portfolio review templates etc.
Key Responsibility Areas	❖ Creating and updating excel worksheets related to: ○ 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 ❖ To prepare 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.

3. **Post: Project Development Manager (Technology)**	
Educational Qualification (As on 01.04.2024)	**Mandatory**: MBA/MMS/PGDM/ME/M.Tech./BE/B.Tech./PGDBM from Government recognized University or Institution.
Post-Qualification Experience (As on 01.04.2024)	**Mandatory**: Minimum 4 years' post qualification experience in banking Technology preferably in a business function.
Specific Skills required (if any)	Nil
Job profile	❖ Managing relationships with the technology partners. ❖ Understanding and communicating business requirements to the IT team and technology partners. ❖ Working closely with the banks' IT teams to ensure timely completion 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.
Key Responsibility Areas	❖ 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. ❖ Creation and documentation of operating manuals for technology interfaces at user level.

4. **Post: Project Development Manager (Business)**	
Educational Qualification (As on 01.04.2024)	**Mandatory**: MBA/PGDM/PGDBM from Government recognized University or Institution
Post-Qualification Experience (As on 01.04.2024)	❖ **Mandatory**: Post Qualification Experience of Minimum 5 years in Bank/wealth Management firms/broking firms. ❖ **Preferred**: Experience in Supervisory function in Business Process Management in Wealth Management area.
Specific Skills required (if any)	Nil
Job profile	❖ 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 Business Operation Team and Circle teams during rollout ❖ Creating and documenting standard operating processes to be followed for existing and new Business lines
Key Responsibility Areas	❖ Monitor activities essential to sales force. ❖ Drive CRM and Implement. ❖ Sales force automation like FD roll over project, inflow outflow management, capacity plan. ❖ Manage process implementation through sales team and back-office teams.

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	❖ Manage and customize design and deliver wealth proposition to chosen segments. ❖ Sales and Client education programmes. ❖ Helping annual planning and budgeting. ❖ Managing P&L, Support business head in prioritizing growth expenses. ❖ Establish business review process and parameters. ❖ Track industry trends, structure, market players and other competitors. ❖ Liaise with internal bank teams for better TATs and proposition of Wealth. ❖ Design business processes and policies encompassing entire client life cycle ❖ Working with HR to provide assistance and clarify the application of sales compensation policies. ❖ Support sales head in developing and launching initiatives to analyse the existing activity as well as new market activities. ❖ Any other matter, as may be entrusted by the Bank from time to time

5. **Post: Relationship Manager**	
Educational Qualification (As on 01.04.2024)	**Mandatory**: Graduate from Government recognized University or Institution
Post-Qualification Experience (As on 01.04.2024)	**Mandatory**: Post-qualification experience of minimum 3 years as a Relationship Manager in Wealth Management with leading Public/Private/Foreign Banks/Broking/ Security firms. The candidate should have 3 years of experience in building and managing relationship with High-Net-worth Clients (having a minimum Total Relationship Value (TRV) of Rs 20.00 Lakh).
Specific Skills required (if any)	Nil
Job profile	❖ Acquiring, nurturing growing and strengthening relationship within the Affluent and HNI segment of Clients in order to meet business objectives. ❖ Selling a range of Investment and Insurance products to these Clients 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 Clients as per the business objectives
Key Responsibility Areas	❖ **Acquire HNI and Affluent Clients** ❖ **Deepen Relationships:** ➢ Manage the Clients of the branch who are defined as Affluent/HNI Clients ➢ Grow the CASA of this portfolio ➢ Selling mortgages, credit cards and drive channel migration ➢ Acquire more Clients from the same household ➢ Service these Clients. ➢ Increase product per customers (PPC) with reference to Wealth products as well as Bank products. ❖ **Wealth Management:** ➢ Do a Financial Needs Analysis and Risk Profiling for the Clients in the portfolio. ➢ Periodic Portfolio reviews for all Clients ➢ Selling investments, life insurance, general insurance and SIP. ➢ Ensure all Clients have a CASA for routing their investments. ❖ **Compliance:** ➢ Ensure AMFI, IRDA and NISM certification ➢ Ensure all Client instructions are executed the same day ➢ Ensure 100% documentation of all transactions. ❖ **Branch Development** ➢ Conduct branch Insurance & Investment seminars to spread financial awareness ➢ Any other matter, as may be entrusted by the Bank from time to time

6. **Post: VP Wealth**	
Educational Qualification (As on 01.04.2024)	**Mandatory**: Graduate from Government recognized University or Institution. **Preferred**: MBA (Banking/Finance/Marketing) with 60% from recognized University or Institution.
Post-Qualification Experience (As on 01.04.2024)	**Mandatory**: Post Qualification Experience of minimum 6 years 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 Ultra High Net Worth Clients (having a minimum Total Relationship Value (TRV) of Rs 100.00 Lakh).
Specific Skills required (if any)	Nil
Job profile	❖ Acquiring, nurturing growing and strengthening relationship within the Affluent and UHNI/HNI segment of Clients in order to meet business objectives

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	❖ Cross Selling a range of Investment, Insurance products and other Asset Classes to these Clients 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), Assets Under Management (AUM), Investment AUM & Increase in Product per Clients as per the business objectives
Key Responsibility Areas	❖ **Acquire UHNI/HNI and Affluent Clients** ❖ **Deepen Relationships** ➢ Manage the Clients of the branch who are defined as Affluent/UHNI/HNI Clients ➢ Grow the CASA/Investment AUM of this portfolio & Other Asset Classes ➢ Cross-sell mortgages, credit cards and drive channel migration ➢ Acquire more Clients from the same household ➢ Service these Clients. ➢ Increase product per customers (PPC) with reference to Wealth products as well as Bank products. ❖ **Wealth Management:** ➢ Do a Financial Needs Analysis and Risk Profiling for the Clients in the portfolio. ➢ Periodic Portfolio reviews for all Clients ➢ Cross-Sell investments, life insurance, general insurance, PMS, SIP and any new investment product. ❖ **Compliance:** ➢ Ensure AMFI, IRDA, NISM and all other relevant certification ➢ Ensure all Client instructions are executed the same day ➢ Ensure 100% documentation of all transactions. ❖ **Branch Development:** ➢ Conduct branch Insurance & Investment seminars to spread financial awareness ➢ Any other matter, as may be entrusted by the Bank from time to time

7. **Post: Relationship Manager - Team Lead**	
Educational Qualification (As on 01.04.2024)	**Mandatory**: Graduate from Government recognized University or Institution.
Post-Qualification Experience (As on 01.04.2024)	❖ **Mandatory**: Post qualification experience of minimum 8 years in relationship management in wealth management with leading Public/Private/Foreign banks/Broking/ Security firms. ❖ **Preferred:** Experience as a Team Lead is preferred.
Specific Skills required (if any)	Nil
Job profile	❖ Managing a team of Relationship Mangers for the Wealth Management Business ❖ Acquiring, nurturing growing and strengthening relationship within the Affluent and HNI segment of Clients in order to meet business objectives ❖ Selling a range of Investment and Insurance products to these Clients 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 Clients as per the business objectives
Key Responsibility Areas	❖ **Acquire HNI and Affluent Clients** ➢ Managing the team of Relationship Mangers and ensuring the team achieves its targets ➢ Ensuring compliance of guidelines, systems & procedures by the Relationship Manager team ➢ Allocation of leads and Clients to appropriate team members ➢ Increase product per customers (PPC) with reference to Wealth products as well as Bank products. ❖ **Deepen Relationships** ➢ Manage the Clients of the Bank who are defined as Affluent/HNI Clients ➢ Grow the CASA of this portfolio ➢ selling mortgages, credit cards and drive channel migration ➢ Acquire more Clients from the same household ➢ Service these Clients. ❖ **Wealth Management** ➢ Do a Financial Needs Analysis and Risk Profiling for the Clients in the portfolio. ➢ Periodic Portfolio reviews for all Clients ➢ Selling investments, life insurance, general insurance and SIP. ➢ Ensure all Clients have a CASA for routing their investments. ❖ **Compliance** ➢ Ensure all Client instructions are executed the same day ➢ Ensure 100% documentation of all transactions.

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	❖ **Branch Development** ➢ Conduct branch Insurance & Investment seminars to spread financial awareness. ➢ Any other matter, as may be entrusted by the Bank from time to time

8. **Post: Regional Head**	
Educational Qualification (As on 01.04.2024)	**Mandatory**: Graduate from Government recognized University or Institution.
Post-Qualification Experience (As on 01.04.2024)	❖ **Mandatory**: i. Post Qualification Experience of Minimum 12 years of experience in relationship management in wealth management with leading Public/Private/Foreign Banks/Broking/Security firms. ii. Post Qualification minimum 5 years of experience in leading a large team of Relationship Managers or a Team Lead in Wealth Management is mandatory.
Specific Skills required (if any)	Nil
Job profile	❖ Managing a team of Relationship Managers & RM (Team Lead)s & Investment Officers for the Wealth Management Business of the allotted Circle(s) ❖ Achieving the target of the team to Acquire, nurturing growing and strengthening relationship within the Affluent and UHNI/HNI segment of Clients in order to meet business objectives ❖ Cross Selling a range of Investment, Insurance products and other Asset Classes to these clients in order to meet their financial planning objectives and thus attaining the revenue objectives of the Wealth Management business of the allotted Circle(s) ❖ Focusing on increasing the Total Relationship Value (TRV), Assets Under Management (AUM), Investment AUM & Increase in Product per Clients as per the business objectives
Key Responsibility Areas	❖ **Acquire HNI and Affluent Clients** ➢ Managing the team of Relationship Mangers, Team Leads & Investment Officers and ensuring the team achieves its target ➢ Ensuring compliance of guidelines, systems & procedures by the Relationship Managers/ RM (Team Lead)/Investment Officers ➢ Allocation of leads and Clients to appropriate team members ➢ Increase product per customers (PPC) with reference to Wealth products as well as Bank products. ❖ **Deepen Relationships** ➢ Manage the Clients of the Bank who are defined as Affluent/UHNI/HNI Clients ➢ Grow the CASA/Investment AUM of this portfolio & Other Asset Classes ➢ Cross-sell mortgages, credit cards and drive channel migration ➢ Acquire more Clients from the same household ➢ Service these Clients. ➢ Monitoring Financial Needs and Risk Profiling of the Clients. ➢ Monitoring Periodic Portfolio reviews for all Clients ➢ Monitoring Proper Mapping of Clients to team. ➢ Ensuring Certification of Training of Team members. ➢ Ensure Leave Discipline among the Team/proper maintenance of visit records ➢ Complaint Management: Timely redressal of Client complaints ❖ **Branch Development** ➢ Conduct Client Meet, seminars and Investment conclave to spread financial awareness. ➢ Any other matter, as may be entrusted by the Bank from time to time

9. **Post: Investment Specialist**	
Educational Qualification (As on 01.04.2024)	❖ **Mandatory**: **i.** MBA/PGDM/PGDBM from recognized College/University or CA/CFA **ii**. Certification by NISM 21A (Valid) ❖ **Preferred:** CA/CFP/NISM Investment Advisor / Research Analyst Certificate
Post-Qualification Experience (As on 01.04.2024)	**Mandatory**: Minimum 6 years of post-qualification experience as an investment advisor/counsellor/officer/part of product team in Wealth Management organization
Specific Skills required (if any)	**Preferred:** i. Good knowledge of investments and markets across asset classes. ii. Experience in managing and advising client portfolios. iii. Good knowledge of asset allocation and re-balancing techniques. iv. Superior presentation skills & other core competencies like leadership and teamwork. v. Experience in products of fixed income, equity and alternate markets.

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Job profile	❖ Guiding clients on range of financial services products ❖ Wide ranging experience across categories such as: MF, FI, Structured Products, Discretionary Portfolios and other Alternate Products. ❖ Strong focus on due diligence, quantitative technique and asset allocation
Key Responsibility Areas	❖ **Assisting the VP Wealth/ Relationship Manager/ RM Wealth in providing expert opinion regarding investments** ➢ Work closely with VP Wealth/RMs / RM Wealth to their clients for creation and implementation of their financial needs. ➢ Prepare presentations for VP Wealth/RMs / RM Wealth and clients on Investment products and view on the market. ➢ Help in providing incidental advice to clients. Provide generic information on taxation of products. ➢ Research and investigate new investment opportunities to determine relevance for clients ➢ Guiding the Clients on the right investment products based on their needs and Improving Client's understanding of complex and structured products. Answer clients' questions about the purposes and details of financial options and strategies referred to by VP Wealth/RMs / RM Wealth. ➢ Research / create house view on investment products and market. ➢ Coaching and regularly updating the VP Wealth/RMs/ RM Wealth team on latest developments and investment products. ❖ **Wealth Management** ➢ Do a Financial Needs Analysis and Risk Profiling for the Clients. ➢ Periodic Portfolio reviews for all Clients ❖ **Compliance** ➢ Ensure AMFI, IRDA and NISM certification ➢ Any other matter, as may be entrusted by the Bank from time to time

10. **Post: Investment Officer**	
Educational Qualification (As on 01.04.2024)	❖ **Mandatory**: **i.** MBA/PGDM/PGDBM from recognized College/University or CA/CFA **ii**. Certification by NISM 21A ❖ **Preferred:** CA/CFP/NISM Investment Advisor / Research Analyst Certificate
Post-Qualification Experience (As on 01.04.2024)	**Mandatory**: Minimum 4 years of post-qualification experience as an investment advisor/counsellor/officer/part of product team in Wealth Management organization
Specific Skills required (if any)	**Preferred:** i. Good knowledge of investments and markets across asset classes. ii. Experience in managing and advising client portfolios. iii. Good knowledge of asset allocation and re-balancing techniques. iv. Superior presentation skills & other core competencies like leadership and teamwork. v. Experience in products of fixed income, equity and alternate markets.
Job profile	❖ Guiding clients on range of financial services products ❖ Wide ranging experience across categories such as: MF, FI, Structured Products, Discretionary Portfolios and other Alternate Products. ❖ Strong focus on due diligence, quantitative technique and asset allocation
Key Responsibility Areas	❖ **Assisting the VP Wealth/ Relationship Manager/ RM Wealth in providing expert opinion regarding investments** ➢ Work closely with VP Wealth/RMs/RM Wealth for creation and implementation of their financial needs. ➢ Prepare presentations for VP Wealth/RMs/RM Wealth and clients on Investment products and view on the market. ➢ Help in providing incidental advice to clients. Provide generic information on taxation of products. ➢ Research and investigate new investment opportunities to determine relevance for clients ➢ Guiding the Clients on the right investment products based on their needs and Improving Client's understanding of complex and structured products. Answer clients' questions about the purposes and details of financial options and strategies referred to by VP Wealth/RMs/RM Wealth ➢ Research / create house view on investment products and market. ➢ Coaching and regularly updating the VP Wealth/RMs/RM Wealth team on latest developments and investment products. ❖ **Wealth Management** ➢ Do a Financial Needs Analysis and Risk Profiling for the Clients ➢ Periodic Portfolio reviews for all Clients ❖ **Compliance** ➢ Ensure AMFI, IRDA and NISM certification ➢ Any other matter, as may be entrusted by the Bank from time to time

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Remarks: KRA's: KRAs shall be assigned on joining. Job Profile mentioned above are illustrative. Role/Jobs in addition to the above mentioned may be assigned by the Bank from time to time for the above posts.

D. LEAVE: The proposed Officers engaged on Contract (OECs) shall be entitled to leave of 30 days during the financial year which will be granted by Bank for genuine and appropriate reasons. For the purpose of computation of leave, intervening Sundays/ Holidays shall not be included. Other terms and conditions of leave may be as applicable to other contract officers.

E. TERMINATION OF CONTRACT: The contract can be terminated without assigning any reason by giving 2 months' notice from either side or by payment/surrender of 2 month's compensation amount in lieu thereof. If the contract is terminated by the Bank, Contractual appointment can be terminated by giving two months' notice/two month's compensation which will include 1/6th of CTC for the current year (Fixed + Variable Pay {if any}). During the probation period, the engagement of contract can be terminated by the Bank by giving **1 months' notice/ 1 month's** compensation (CTC) without assigning any reasons / Non-performance / not following the Contract Rules.

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 PROCESS: The selection will be based on shortlisting and interview-cum-CTC negotiations.

- **Shortlisting: Mere fulfilling minimum qualification and experience will not vest any right 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.** The shortlisted candidates will be called for interview.
- **Interview-cum-CTC Negotiation:** Interview will carry 100 marks. The qualifying marks in interview will be decided by the Bank. No correspondence will be entertained in this regard. CTC Negotiation will be done one-by-one at the time of Interview, with the candidates.
- **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 scores the cut-off marks (common marks at cut-off point), such candidates will be ranked according to their age in descending order, in the merit list.

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H. HOW TO APPLY: Candidates should have **valid email ID** which should be kept active till the declaration of result. It will help him/her in getting call letter/Interview advice etc. by email.

GUIDELINES FOR FILLING ONLINE APPLICATION	GUIDELINES FOR PAYMENT OF FEES
i. Candidates will be required to register themselves online through the link available on SBI website **https://bank.sbi/careers/current-openings** and pay the application fee using Internet Banking/ Debit Card/ Credit Card 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 on the online registration page (under 'How to Upload Document"). iii. Candidates should fill the application carefully. Once application is filled-in completely, candidate should submit the same. In the event of candidate not being able to fill the application in one go, he can save the information already entered. When the information/ application is saved, a provisional registration number and password is generated by the system and displayed on the screen. **Candidate should note down the registration number and password.** They can re-open the saved application using registration number and password and edit the particulars, if needed. This facility of editing the saved information will be available for three times only. Once the application is filled completely, candidate should submit the same and proceed for online payment of fee. iv. **After registering online, the candidates are advised to take a printout of the system generated online application forms.**	i. Application fees and Intimation Charges (Non-refundable) is ₹750/- (₹Seven Hundred Fifty only) for General/EWS candidates and no fees/intimation charges for SC/ ST/ OBC/ PwBD candidates. ii. After ensuring correctness of the particulars in the application form, candidates are required to pay the fees through payment gateway integrated with the application. No change/ edit in the application will be allowed thereafter. iii. Fee payment will have to be made online through payment gateway available thereat. 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. iv. On successful completion of the transaction, e-receipt and application form, bearing the date of submission by the candidate, will be generated which should be printed and retained by the candidate. v. If the online payment of fee is not successfully completed in first instance, please make fresh attempts to make online payment. vi. A provision is there to reprint the e-Receipt and Application form containing fee details, at later stage. vii. **Application Fee once paid will NOT be refunded on any account NOR can it be adjusted for any other examination or selection in future.**

I. HOW TO UPLOAD DOCUMENTS:

a. Details of Document to be uploaded: i. Recent Photograph ii. Signature iii. Brief Resume (PDF) iv. ID Proof (PDF) v. Proof of Date of Birth (PDF) vi. PwBD certification (if applicable) (PDF) vii. Educational Certificates: Relevant Mark-Sheets/ Degree Certificate (PDF) viii. Experience certificates (PDF) ix. Form-16/Offer Letter/Latest Salary slip from current employer (PDF) x. No Objection Certificate (If applicable) (PDF)	**d. Document file type/ size:** i. All Documents must be in PDF (except Photograph & Signature) 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. Please ensure that Documents uploaded are clear and readable.
b. Photograph file type/ size: i. Photograph must be a recent passport style colour picture. ii. Size of file should be between 20 kb - 50 kb and Dimensions 200 x 230 pixels (preferred) iii. Make sure that the picture is in colour, taken against a light-coloured, preferably white, background. iv. Look straight at the camera with a relaxed face v. 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 vi. If you have to use flash, ensure there's no "red-eye"	**e. Guidelines for scanning of photograph/ signature/ documents:** i. Set the scanner resolution to a minimum of 200 dpi (dots per inch) ii. Set Color to True Color iii. 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). iv. The photo/ signature file should be JPG or JPEG format (i.e. file name should appear as: image01.jpg or image01.jpeg). v. Image dimensions can be checked by listing the folder/ files or moving the mouse over the file image icon. vi. Candidates using MS Windows/ MSOffice can easily obtain photo and signature in .jpeg format not exceeding 50 kb & 20 kb respectively by

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vii. If you wear glasses make sure that there are no reflections and your eyes can be clearly seen.

viii. Caps, hats and dark glasses are not acceptable. Religious headwear is allowed but it must not cover your face.

ix. Ensure that the size of the scanned image is not more than 50kb. If the size of the file is more than 50 kb, then adjust the settings of the scanner such as the DPI resolution, no. of colour etc., during the process of scanning.

using MS Paint 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. The file size can be reduced below 50 kb (photograph) & 20 kb (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 another photo editor also.

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

c. Signature file type/ size:

i. The applicant has to sign on white paper with Black Ink pen.

ii. The signature must be signed only by the applicant and not by any other person.

iii. The signature will be used to put on the Call Letter and wherever necessary.

iv. Size of file should be between 10 kb - 20 kb and Dimensions 140 x 60 pixels (preferred).

v. Ensure that the size of the scanned image is not more than 20 kb.

vi. Signature in CAPITAL LETTERS shall NOT be accepted.

f. 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 JPG or JEPG, PDF, DOC or DOCX file has been saved.

iv. Select the file by clicking on it and 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.**

J. GENERAL INFORMATION:

I. Before applying for the post, the applicant should ensure that he/ she fulfils the eligibility and other norms mentioned above for that post as on the specified date and that the particulars furnished by him/ her are correct in all respects.

II. Candidates belonging to reserved category including, for whom no reservation has been mentioned, are free to apply for vacancies announced for General category provided they must fulfil all the eligibility conditions applicable to General category.

III. **IN CASE IT IS DETECTED AT ANY STAGE OF RECRUITMENT THAT AN APPLICANT 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 ENGAGEMENT, HIS/ HER CONTRACTS ARE LIABLE TO BE TERMINATED.**

IV. The applicant should ensure that the application is strictly in accordance with the prescribed format and is properly filled.

V. Engagement of selected candidate is subject to his/ her being declared medically fit as per the requirement of the Bank. Such engagement 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.

VI. Candidates are advised to keep their e-mail ID active for receiving communication viz. call letters/ Interview date advices etc.

VII. The Bank takes no responsibility for any delay in receipt or loss of any communication.

X. 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. 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.

XI. DECISION 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.

XII. The applicant shall be liable for civil/ criminal consequences in case the information submitted in his/ her application are found to be false at a later stage.

XIII. Merely satisfying the eligibility norms does not entitle a candidate to be called for interview. Bank reserves the right to call only the requisite number of candidates for the interview after preliminary screening/ short-listing with reference to candidate's qualification, suitability, experience etc.

XIV. In case of multiple application, only the last valid (completed) application will be retained, the application fee/ intimation charge paid for other registration will stand forfeited.

XV. 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.

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VIII.	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 and travelling expenses, if any, otherwise admissible, will not be paid.	XVI.	Outstation candidates, who may be called for interview after short-listing will be reimbursed the cost of travelling by Air (Economy Class) fare for the shortest route in India OR the actual travel cost in India (whichever is lower) on the basis of actual journey. Local conveyance like taxi/cab/personal vehicle expenses/fares will not be payable. A candidate, if found ineligible for the post will not be permitted to appear for the interview and will not be reimbursed any fare.
IX.	In case of selection, candidates will be required to produce proper discharge certificate from the employer at the time of taking up the engagement.	XVII.	**Bank reserves the Right to cancel the recruitment process entirely or for any particular post at any stage.**
		XVIII.	**At the time of interview, the candidate will be required to provide details regarding criminal cases pending against him/her, if any. The Bank may also conduct independent verification, inter alia, including verification of Police Records, etc. The Bank reserves the right to deny the engagement depending upon such disclosure and/or independent verification.**

For any query, please write to us through link "CONTACT US/ Post Your Query" which is available on Bank's website (https://bank.sbi/web/careers)

The Bank is not liable for printing errors, if any.

Mumbai
19.07.2024

GENERAL MANAGER
(RP&PM)

HOW TO APPLY

Login to https://bank.sbi/careers/current-openings

Scroll down and click on the respective advertisement

Download advertisement no. CRPD/SCO/2024-25/09
(Carefully read the detailed advertisement)

Apply Online
(Before final submission, please go through your application. Corrections will not be allowed after final submission)

