**Job Description**

**Position Name** : Financial Education Counsellor (FEC)

**Reporting to** : Centre Head / Regional Head

**Qualification Required:** Graduate in any stream, post-graduation degree will be an added

Advantage.

**Skills :**

Financial Literacy, Financial Securities, Mutual Funds Background, Sourcing, NISM Certificate would be an advantage, Sales, Interpersonal Skills, B2B orientation, Geographical market knowledge, Ground Connect

**Role purpose:**

To identify, Acquire and train new to MF industry prospective IFA. To improve the regional empanelment rate

ICICI Academy for Skills is a skill development initiative for the unemployed youth instituted across the country, under the aegis of ICICI Foundation. The initiative focuses on imparting vocational skills to the youth and creating a direct impact by enabling livelihood. IAS offers vocational trainings to youth at two levels:

- Youth who drop out of the formal education system after Class XII

- Youth who have recently completed graduation

**Job Responsibilities:**

* **Adhering to the training schedule and ensuring imparting of quality training as per defined parameters and scheduled timelines, comprising of the following:**

o Ensure that the Code of Conduct is duly administered and adhered to

o Ensure maintenance of day wise module and curriculum of each courses/trade and daily log for the course being conducted and the same to be displayed in the classroom

o Ensure maintenance of attendance sheet for each training session in the prescribed format

o Ensure timely feedback to training coordinator with regards to the training

o Provide continuous guidance and mentoring to trainees

o Ensure timely availability of training materials / consumables / tool kits at the site of the trainings

o Ensure timely reports, success stories, best practices, write ups for newsletter and any other required communication

o Submission of MIS as per the agreed calendar

o Manage the evaluation and certification process for the candidates upon completion of training

* **Sourcing of trainees for each batch well in advance with adequate applications in the pipeline for at least one additional batch. This will comprise of the following:**

o Conduct sourcing activities by exploring all sourcing channels like catchment areas, educational institutions, employment exchanges, ICICI Group references, etc.

o Ensure updated sourcing collaterals are available at the required times in adequate numbers

o Documentation of sourcing activities including filling in of application forms and other required pre training activities

**Trade specific:**

Conduct training for FEC course. This will include the following

* **IFA Acquisition**

o Conduct sourcing activities by exploring all sourcing channels like catchment areas, educational institutions, employment exchanges, ICICI Group references, etc.

o Ensure updated sourcing collaterals are available at the required times in adequate numbers

o Documentation of sourcing activities including filling in of application forms and other required pre training activities.

* **To identify new to MF industry prospects and empanel them.**

o To source prospective individuals who would be interested in starting their own business as IFAs, inform them of the prospects, requirements, etc. and on-board them for the training course at the Centre. Conduct on-boarding meet for all new IFAs acquired in the regions including making proper presentations to the candidates and introducing them to products & processes in the MF industry.

* **Empanel Active ARN holders but not empaneled**

o To organize financial literacy camps at SME’s, start-ups, small enterprises, housing societies, various associations etc. with due permissions.

o Ensuring all administrative requirements are attended to prior to the meeting time. Undertaking various financial literacy sessions (various topics) depending on the level of the understanding and the requirements of the audience.

* **Conduct Mass meetings for business opportunity presentation**

o Undertake any other activity as may be required by the Centre Head / Faculty cum Centre-in charge