Choice
The Joy of Earning

Job Description – Sales Officers (Broking, Insurance & Wealth)

Company: Choice International Limited or its subsidiaries
Department: Sales – Broking, Insurance & Wealth
Location: PAN India
Reporting To: Team Leader / Sales Manager

About the company

Choice International is one of India's leading diversified financial services groups, offering a comprehensive suite of solutions across Broking, Wealth Management, Investment Banking, NBFC services, Insurance, Fintech, Financial Education, B2B Consulting, and Government Advisory Services. With a strong nationwide presence and a client-first philosophy, Choice is committed to empowering individuals, businesses, and institutions with trusted financial expertise, digital innovation, and long-term value creation.

Built on the pillars of integrity, growth, and continuous learning, Choice fosters a culture where talent is nurtured, ideas are encouraged, and people are inspired to deliver excellence every day.

Please visit www.choiceindia.com to know more.

Role Overview

The Sales Associate will be responsible for acquiring and servicing clients across equity broking, insurance products, and wealth management solutions. This role involves client interaction, product advisory, lead conversion, and ensuring a high-quality customer experience while meeting sales targets. The ideal candidate should have strong communication skills, product knowledge, and a passion for financial markets.

Key Responsibilities

- Client Acquisition & Lead Management
- Source and acquire new clients through cold calling, referrals, digital leads, and walk-ins.
- Understand client needs and recommend suitable broking, insurance, and wealth products.
- Maintain healthy sales pipelines and ensure timely lead follow-ups.

Broking – Equity & Trading

- Assist clients with account opening, KYC completion, and onboarding.
- Promote equity, derivatives, commodities, and currency products based on client suitability.
- Educate clients on market trends, investment opportunities, trading platforms, and tools.

Insurance Sales

- Pitch and sell life, health, motor, general insurance, and other relevant policies.
- Assess client risk profile and recommend appropriate insurance solutions.
- Ensure policy documentation, renewals, and customer servicing are completed accurately.

Wealth Management

- Cross-sell mutual funds, PMS/AIF (if applicable), corporate FDs, NPS, bonds, and other wealth products.
- Assist clients in portfolio planning based on their goals and risk appetite.
- Conduct periodic portfolio reviews and maintain long-term client relationships.

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Customer Service & Relationship Management

- Provide prompt solutions to client queries and ensure high customer satisfaction.
- Maintain strong relationships with existing clients to encourage repeat and referral business.
- Coordinate with operations, back-office, and product teams for seamless service delivery.

Compliance & Reporting

- Follow all regulatory guidelines issued by SEBI, IRDAI, and Exchange norms.
- Maintain proper records of interactions, transactions, and sales reports.
- Adhere to company policies and achieve monthly/quarterly targets.

Required Skills & Competencies

- Strong communication and interpersonal skills.
- Basic understanding of stock markets, insurance, and wealth management products.
- Sales-driven, target-oriented, and self-motivated.
- Ability to handle objections and close deals effectively.
- Good knowledge of MS Office and CRM tools.

Qualification & Experience

Education: Graduate in any discipline (Finance preferred).

Experience: 0–3 years in sales of broking/insurance/wealth; freshers with passion for financial markets may also apply.

Certifications: NISM/IRDAI certifications preferred (or willingness to complete after joining).

Why Join Choice International Limited?

- Opportunity to work with a diversified financial services group.
- Attractive incentives, performance bonuses, and career growth pathways.
- Exposure to multiple product lines—broking, insurance, and wealth.