

**Name : OMKAR ASHOK DALAVI**

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## SUMMARY

MBA – (Finance and Marketing) Postgraduate with excellent interpersonal, analytical and communication skills. Aspire to build a rewarding career in the field of Finance and Marketing by utilizing my skills and knowledge and thus grow with the organization.

### 1) Working with- Australia and New Zealand Bank (ANZ) From 6<sup>th</sup> May 2019

#### Role- Senior Mortgage Officer

#### Responsibilities-

- Collaborating cross-functionally with personal bankers and business development managers to gather and document data for KYC (Know Your Customer) and monthly transactional details required for loan proposal reviews.
- Creating compliant loan and mortgage documents for review, process, and close procedures regarding customer loan proposals.
- Managing escalation of high priority applications by interacting with front-line teams, and PoC for inbox requests for any shortcomings on the application to enable rectification and re-issuance of documents to account executives.
- Analyzing multiple loan application types such as Purchase, Refinance, Supplementary, Construction and Bridging, to identify whether the deal type could settle through PEXA (Property Exchange Australia – Online Settlement) or paper filing.
- Prepare a daily report of all applications settling through PEXA and invite related parties (other Financial Institutions, Solicitors) by creating a new workspace for each application.
- Assisting Subject Matter Expert (SME) in UAT of new features of the software and applications used such as RLS (Retail Lending System), Integrity (in-house software), PEGA's DocGen.
- Identifying suspicious customer details and flagging them to the Credit Fraud Risk team.
- Processing home loan documents for all the types of loans such as LAP, Commercial Purchase, Second Mortgage Loan, Home Loans, and LRP.
- Verifying all the required documents to sanction the loan and loading and processing of documents.
- Handling Guarantor involved cases and working on 1<sup>st</sup> Mortgage, 2<sup>nd</sup> Registered Mortgage.
- Perform role of QC officer and provide feedback to staff to avoid an error in future.
- Mentor staff on the various impact which might hamper the organization if actions are not taken correctly.
- Supervising the implementation of quality control procedures and conducting set sample checks on loans processed by individual staff.
- Training newly on boarded members on the home lending process and mentoring them with any queries they have in the process, and also responsible for change management among existing staff for process updates.

## 2) Worked with- Prime Realty Housing and Development Pvt. Ltd.

**Tenure- 2 year and 2 months. (From 1<sup>st</sup> April 2015 to 22<sup>nd</sup> May 2017)**

### **Role- Accountant Clerk**

#### **Responsibilities-**

- Handling all data entry work/Data Management
- Working on Cash Applications, Invoice processing, order and payment entries.
- Maintaining Accounts payable and receivable information.
- Reporting to hire department of all daily work through email.
- Handling customer's issues.
- Maintaining daily work of Account with manually and in ERP software.
- Handling Cash/Credit transactions, processing the transactions
- Checking inventory records for accuracy. Stock of products Validation & Reporting.

## **EDUCATION**

- Completed MBA in (Finance + Marketing) from Community Institute of Management Studies Bangalore. (Bangalore University 2017-2019) with 7.5 CGPA.
- Completed B.com in (Advanced Accountancy) from Shivaji University, Kolhapur. (2014-2017) with 78.17%
- Completed HSC from Pune Board, Pune. (2012-2014) with 79.69%
- Completed SSC from Pune Board, Pune (March-2012) with 79.82%

## **PROJECT/INTERNSHIP UNDERTAKEN**

- MBA 3<sup>rd</sup> Semester Project on “A Study on Evaluation of Future and Option Contracts in Equity Market with special reference to Bangalore City.”
- MBA 4<sup>th</sup> Semester Project on “A Study on Behaviours exhibited by investors towards Mutual Funds with special reference to Birla Sun Life Mutual Funds Bangalore.”

## **SKILLS-SETS/STRENGTHS**

- |                       |                      |
|-----------------------|----------------------|
| • Credit Underwriting | Capital Budgeting    |
| • Self-Management     | Keen eye for details |
| • Analytical Skills   | Team Work/Handling   |

## **REFERENCES**

- Shall be given if needed.

## CERTIFICATIONS/TECHNICAL SKILLS/LANGUAGES KNOWN

Obtained certificate in MS•CIT (Computer course) with 92%  
Obtained certificate in I.T. (Information Technology) with 85%  
Obtained certificate in Insurance with 75.33%

Languages Known: English, Hindi, Marathi, and Konkani.

## ACHIEVEMENTS /EXTRA CURRICULAR ACTIVITIES

- Awarded Seven times as Star Performer in current organization.
- Received “Outstanding Performer 2019-20” and “Strong Performer 2020-21” Annual Award at ANZ.
- Facilitated with “Outstanding Performer Award” for MBA
- Volunteer of LEO club under Lions Club Bangalore.
- Coordinator of National Level Management Fest for Finance Activity.
- Presented paper on Electronics Industry and Small Scale Industry in India.
- Attended one day workshop conducted in College on Business Proposal.

## AREAS OF INTEREST

- Networking, Travelling and Research

## PERSONAL DETAILS

**Date of Birth** : 6<sup>th</sup> June 1996

**Present Address** : 779, 66<sup>th</sup> cross, 1 stage Kumaraswamy Layout,  
Bangalore, 560078

**Permanent Address** : H. No. 1415 At/Post/Tal – Teacher’s Colony Chandgad,  
Dist-Kolhapur, Maharashtra 416509

**Aadhar No** : 354898270212

### Declaration:

I hereby declare that all the information given by me is true to the best of my knowledge.

Place:

Date:

Signature