



Md Aamir khan

Salesforce Admin (CRM) & Trade Finance

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PROFILE

Implemented Sales force customizations (included new fields, layouts, and objects) to meet CRM needs of sales with Trade Finance Operation with over 6 Years of working experience in (CRM, Customer Service, Teller Service, LC/BG Issuance, Advising, Confirmation, Doc checking, Bill Acceptance, Negotiation and Discounting, Bills Receivable Purchase and other Trade Products), Reconciliation, General Banking Operation (Account Services, Corporate Bilateral and Loans) and Credit Admin with leading Corporate i.e., HDFC Bank and Al Nejum AL Canadiah General Trading LLC.

SKILLS

• Sales force Administration CRM	● ● ● ● ●	• Reports, Dashboards, Workflows, Sharing, Rules, Profiles.	● ● ● ● ●
• Well versed with Microsoft office/Outlook	● ● ● ● ●	• MIS Reporting MS-office & Google Sheet	● ● ● ● ●
• Social Media Marketing/ SEM Digital Marketing	● ● ● ● ●	• Banking operations knowledge	● ● ● ● ●
• Database Management Knowledge.	● ● ● ● ●	• Teamwork and Collaboration/Multitasking Abilities/Dependable and Responsible.	● ● ● ● ●

CERTIFICATES

Salesforce Administration CRM from Intellipaath (IIM Madras)	Anti-Money Laundering and Know your Customer (AML & KYC) from Indian Institute of Banking and Finance.	Advance Diploma Computer Application from I MAS Patna
Digital Marketing from DTI Delhi		

EDUCATION

Bachelor of Finance Lalit Narayan Mithila University Darbhanga Specialization in Finance and Marketing.	05/2010 – 06/2013 India
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LANGUAGES

English IELTS	● ● ● ● ●	Hindi	● ● ● ● ●
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INTERESTS

• Music	• Cricket	• Learn New Things
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VISA DETAILS

Visit Visa	11/2022 Dubai, United Arab Emirates
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PROFESSIONAL EXPERIENCE

Branch Operation with Customer Service.

HDFC Bank Ltd

06/2014 – 08/2017 | New Delhi, India

Trade Finance Officer with Customer Service.

HDFC Bank Ltd

04/2020 – 03/2022 | New Delhi, India

Assistant Manager Trade Finance/Branch Banking- 06-2014 - 08-2017

- Handling the Bank Guarantee for all Capital and Commodity Market Client: Issuance, Amendment and Cancellation of Financial and Non-Financial Bank Guarantee, Sending Tracers.
- Cash handling, Remittance challan & Vault custodian
- Processing the local currency transaction and settlements through RTGS and NEFT within the time limit.
- Manage all communication with bank and provide excellent customer service and resolve any customer issues.
- Communicating with clients over email and telephone by that maintaining strong bond with the customers.
- Understanding bank processes on core banking, lending, private banking and all aspects related to retail & Wholesale banking.
- Coordinate with individual client requirement and give the best solution insurance policies, accounts opening, loans, fixed deposit and mutual funds.
- Call back of the daily transactions and filing the vouchers accordingly, EOD Activities and GL Reconciliation.
- Maintenance of various registers and their review on frequent intervals.
- Responded to a broad range of customer inquiries and swiftly resolved problems.
- Ability to deal with large transaction volumes.
- Reconciliation

Credit Administration Department.

- To adhere the process and check the enforceability of the documents from legal aspects.
- To maintain various MIS and publish it timely to improve the process.
- Addition of New Borrower in Commodity Finance segment for Pledge Facility by scrutinizing the loan documents provided by them.
- Verifying documents, pre disbursement clearance for loans and post sanction follow-ups i.e., tracking of deferrals, publishing the MIS for overdue deferrals.

Finance with Customer Relationship Management.

Al Nejum Al Canadiah General Trading llc

03/2018 – 03/2020

Sharjah, United Arab Emirates

- Confirmed all shipping details before allowing packages to leave facility.
- Coordinated overseas shipping with customs agents for clearance.
- Handled claims with insurance companies for issues with shipments.
- Prepared inventory and sales reports.
- Maintained ongoing tracking information from shipment to delivery.
- Coordinated with clients and shippers to ensure continuity with shipping details.
- Maintained an effective data management system to track all shipments and deliveries.
- Maintaining and developing relationships with existing customers in person via calls and emails.
- Cold calling to arrange meetings with potential customers to prospect for new business.
- Coordinated with the marketing team to manage good and friendly relationships.
- Assigned weekly orders to fellow officers before the deadline while handling multiple assignments.
- Responsible for maintaining purchasing levels and making sure that all purchases were properly approved.
- Responding to incoming mails and phone queries.
- Negotiating on price, costs, delivery and specifications with buyers and managers.
- Recording sales and order information and sending copies to the sales office or entering into a computer system.
- Suggesting the most viable solution and cultivating relations for customer retention.

DECLARATION

I hereby declare that the above-mentioned information is true to the best of my knowledge. _____

Md Aamir khan
Dubai