Name: Varsha Karotiya
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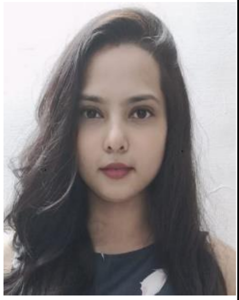

My goal is to transit my enthusiasm & experience into a position, where I continue to provide the assistance in achieving organizational Goal. I am certain that my presence in your team will prove to be beneficial to your organization.

Professional Overview

- Offering 7 years of experience in Operations and Customer service.
- Sharing in-house recommendation with customer, adhering to dealing rules and policy.
- Customer Oriented Professional, committed towards increasing revenue, maximizing performance and providing the highest levels of customer service.
- Adept in monitoring various operations and maintaining long-term relationships with Retail and wealth Clients with focus on high quality service.
- Proficient at building productive relationship, Team player with excellent communication, interpersonal, analytical and problem solving skills.

Work Experience

Previous Employer: Motilal Oswal Wealth Limited

May 2021 – November 2021 – Assistant Manager - Wealth operations

Role and Responsibilities

- Developing customer base and establishing long term relationship with an assigned clientele portfolio.
- Reporting, feedback and analytics on performances of the various investments and products
- Handling account opening and modifications of PMS, AIF, Equity, IPO funding, structure products, NRI, Mutual funds.
- Placing Mutual fund, PMS, AIF orders on BSE star platform and through AMC's.
- Providing MIS, statements and resolving queries as required by internal and external customers.
- Ensured smooth processing of KRA and KYC of clients.
- Discerns to internal and external regulations.
- Maintaining and updating of client business log and client on-boarding on portal.
- Sound knowledge of NRI Account opening, Individual & Non-Individual accounts, Modifications, depository, KRA, KYC Updations, Mutual funds, Settlements processes.
- Supporting branch improvement initiatives providing customer feedback of our service and ensuring compliance with audit requirements and quality assurance.
- Ability to multi-task in a fast paced office environment.
- Coordinating with different RTA'S and AMC'S and providing end to end solutions.
- Extracting and providing Mutual fund Statement of accounts, PMS and AIF statements, Audit reports, broking related statements and distribution letters to clients.
- Arranging pick and drop of documents and cheques from clients to the internal teams.
- Strong follow up with the clients and RM to process the investments in the accounts.

Edelweiss Broking Limited

December 2017 - May 2021 - Client Experience Officer - Retail and wealth clients/Sub-brokers.

Role and Responsibilities

- Building strong and active relationship with clients.
- Ensured quick resolution and keeping customer informed about the progress in cases.
- Ensured highest level of customer satisfaction.
- Proactively escalated potential issues/concerns.
- Having good knowledge of Mutual Funds, Structure product, PMS, Broking, Bonds/NCD.
- Providing MIS , statements and resolving queries as required by internal and external customers.
- Liasoning with various internal and external operations teams to keep a track of all customer investment and queries.
- Ensured normal Trading and Demat account opening, modifications, depository documentation, KRA and KYC are completed within TAT.
- Adheres to internal and external regulations.
- Suggesting internal process improvement.
- Maintaining and updating of client records at periodic intervals and act as a single point of contact for RMs, Clients, Partners and Operation Teams.
- Sound knowledge of NRI Account opening, Individual & Non-Individual accounts, Modifications, depository, KRA.
- Handling DP & Settlement queries, managing risk shortfall on timely basis.
- Servicing Retail and HNI clients. .
- Ability to multi-task in a fast paced office environment.
- Detail oriented and strong Customer Service focus.
- Manage pay-in & pay-out process including reviewing, verifying and also processing of cheques.
- Onboarding and training clients, partners and relationship managers.
- Conducting Audits and preparing reports.

Kotak Securities Ltd.

July 2015 to November 2017 - Assistant Manager - Customer service

Role and Responsibilities

- Solving Queries of the customers through calls, Email, chats, Q-forms and sms.
- Handling online trading accounts of clients and execute orders as per client request.
- Confirmations of trade done by EOD.
- Ensure the volumes of trade is higher& clients trade frequently.
- Promoting in house equity research calls to increase volume & frequency.
- Accurate & timely execution of orders on terminal.
- Monitor client exposure limits.
- Escalating customer grievance / trade error and to resolve it immediately.
- Handling Outbound Activities like Welcome Calling to customer, pitching Demat products to new customer, KYC Calling, Client Detail updation calling.
- Handling documentations of modifications, closures, Dematerialisation, DIS slips.
- Helping team members and providing floor support.
- Handling queries and cases of mutual fund of voice and non -voice team.

Nanojobs.com

April 2013 to March 2014 - Business development Executive - Sales

Role and Responsibilities

- Provide a high level of Customer Satisfaction and demonstrate Excellent People Skills.
- Handling calls and providing information about blue and grey collard employees and different packages.
- Coordinating with clients and fixing an appointment for demonstration of online job portal.
- Maintaining MIS and details about the appointments.
- Monitoring service calls and sharing the feedback with reporting manager for quality improvement.
- Escalating customer grievance and to resolve it immediately.
- Handling Query/Request/Complaints through inbound and outbound calls.

Achievements

- Awarded “Debutant of the Week” for FY 2020-2021
- Awarded “Nakshatra” for Process Champion for FY 2019-2020
- Awarded “Acer” for the best performer in quarter II of FY 2019-2020
- Awarded “Star of the Month” for the Month June 2017
- Awarded “Star of the Week ” for the week August 2017

Professional and IT skills

- NISM Series V – Mutual Fund
- NISM Series VII – Equity
- Completed design thinking course
- Acquired sound knowledge of Microsoft Office (MS Office)

Academic Credentials

- MBA in Finance - SVKM's NMIMS University in 2021
- Masters in Commerce - Kalina University, Mumbai University in 2017
- Bachelor in commerce - P.L Dalmia College Mumbai University in 2015
- Higher secondary certificate - Viva College, Maharashtra Board in 2012
- Secondary school certificate - St. Francis Xavier’s high school, Maharashtra Board in 2010

Personal Vitae

- Date of Birth : 29th August 1994
- Marital Status : Single
- Languages Known : English, Hindi and Marathi
- Nationality : Indian
- Address : Al Jaddaf Dubai
- Passport : U8518823
- Visit Visa Valid : March 2022