**Rahul Chandrakant Rokade**

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Q-10 /119, France Cluster, International City, Dubai, UAE

**NOTABLE HIGHLIGHTS**

* Opening Bank account/ Issuing passbook/ Issuing Cheque Book.
* Issuing ATM card and Pin processing details for activation of the same.
* Processing Cheque clearing and Ecs, NEFT and RTGS transactions.
* Handaling Fixed Deposit and recurring deposit also TDS process for the same.
* Processing death claim settlement, handling Cash payments and receipts.
* Locker operations and loan recovery arbitration work.
* Insurance sales and service of life and health.
* Doing KYC and verification of documents.
* Opening demat account and pms account for Mutual fund with in person verification.

**Professional Experience**

* Currently working as a Relationship Manager and Sales and Service in CAT department of Max life insurance company since 21th Feb 2020 To till date.

The activities covered are as follows:

1. **Sales and service to existing customer In CAT(Customer Advisory Team)**

* Handling Assigned customer portfolio of investment.
* Calling them for upsale and cross sell of Life insurance Investments solution.
* Meeting Customer sharing them their portfolio and helping them to achieve investment objective.
* Giving service to customers like policy document, change in personal details additional or change in nomination
* Helping customers for death claim settlement
* Selling term Plan and investment plans.
* Updating meeting in system.

1. **Processing investment.**

* As per customer requirement processing the application in system.
* Allocation of debt and equity mix in portfolio.
* Helping customers to make online payment in system.
* Worked with Dombivali Nagari Sahakari Bank(Multi State Schedule Bank)

Handled end to end operations In bills department Bhiwandi Bank and Central Office Recovery Dept.(9'th June 2015 – 30'th June 2019)

TITLE Assistant Manager 9th June 2015-:-

* Opening saving/current accounts in system.
* Issuing passbook, cheque book, ATM card and pin.
* Processing cheque clearing, Ecs passing/rejection and NEFT,RTGS transaction.
* Managing Fixed Deposit and Recurring Deposit also TDS work.
* Doing loan department site visit and preparing visit reports of the same.
* Reconciliation of GL accounts And passing the entries.
* Accepting cash and making payments, keeping cash tally eod.
* Doing half yearly and yearly closing work.
* Worked in recovery department at central office of bank.

TITTLE : Manager in Recovery Dept.Dombivli Nagari Sahakari Bank July 2018-June 2019

* Handaling arbitration work.
* Attending hearings on arbitration dates.
* Preparing/ filling plaint/ case against loan defaltures.
* Recovery of NPA loan accounts.
* Issuing Notice of hearings.
* Maintaining Record of case filled and judgement.
* Worked with icici prudential life insurance Co. Ltd

Bancaassurance channel sales and service of life insurance investments t.(Jun 2013- July 2014)

WorkinginBancaassurancechannel.

* Coordinating with the ICICIBANK-Branch.
* Giving training and motivating bank staff to do the business.
* Selling ULIP/Traditional Investments solutions and Term plan.
* Doing Joint Calls with bank staff.
* Understanding the requirements of clients and accordingly suggest them the Solution.
* Providing the after sale service.
* Worked with NJ India Invest Pvt Ltd

Executive sales for opening Mutual fund demat and pms account (Jan 2011- June 2012)

Working In B2B Sales Profile For Mutual Fund Demat.

* Opening Trading and Demat Account,Portfolio Management Services(PMS)Account.
* Taking meetings and motivating the Sub-Brokers by sharing the concept of Mutual Fund Demat Account .
* Coordinating with the subbrokers and their clients.
* Doing ImpersonalVerification of customers.
* Giving the DEMO of doing transaction i.e.Buying and Selling Mutual Fund.

**Roles and Responsibilities**

* Ensuring Sales from assign Clients and also service to them.
* Ensure the NPA to be recovered.
* Daily bills department work to get complete of cheque clearing, NEFT-RTGS processing.
* Ensuring death claim settlement on time
* Handling Fixed deposit and Recurring deposit along with TDS work
* Cross selling and upsale of insurance investments solution.

**academic qualifications**

* PGDBA passed in the year 2013
* BMS passed in the year 2010
* HSC passed in the year 2007
* SSC passed in the year 2005

**Technical skills**

* Windows And MS Office
* Banking Applications: omni and flexcube
* Internet and email communication

**strengths**

* Positive Attitude and logical thinking
* Team Player
* Hardworking and Goal Oriented
* Very Good in communication skills.
* Continually recognized with position of increasing responsibility for outstanding work ethics.
* Team Leader who establishes Goals and Motivates employees to achieve their Objectives.

**personal details**

Date of Birth: 10th June 1990

Hobbies & Interest: Doing Gym, Travel to different places andl listening to the Music

Languages Known: English, Hindi, Marathi .

Marital status : Married.

Passport No: T4047158