



SHREYAS MAYUR VORA

CONTACT

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India, 400012

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Email :

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SKILLS

Communication Skills:

Languages known: English,
Hindi, Gujarati.

Computer & software knowledge:

Conversant in MS Office – MS
Word, MS Excel, Power Point.

PROFESSIONAL SUMMARY

I incline to seek a challenging position in your esteemed organization. Given the opportunity to serve your prestigious organization, I assure you of my best commitment to work with passion, sincere, diligent, honesty and dedication.

WORK HISTORY

Strong 5 years and 4 months experience in Currency Derivatives and Financial markets, specialized in Equity markets.

MOTILAL OSWAL Mumbai, India.

Financial Advisor June,2020 till present

Motilal Oswal Financial Services Limited is an Indian financial services company offering a range of financial products and services.

- Established strategies to improve client acquisition, retention and satisfaction.
- Grew business with existing clients through upselling and recommending new services.
- Built trusted relationships with key client stakeholders to drive sales and revenue.
- Prepared and presented product presentations to key decision-makers to close sales.
- Built long-term relationships with lucrative clients by utilizing active listening, effective communication and dynamic interpersonal skills.

ACCOMPLISHMENTS

Certification in Mutual Funds Distributors (NISM Series- V A) from National Institute of Securities Markets.

ADDITIONAL INFORMATION

Personal interests:

*Cricket tournaments, Chess, Volleyball.

Passport details:

Passport Number : V5770190

Date of Issue : 22/12/2021

Date of Expiry : 21/12/2031

Place of Issue : Mumbai.

Senior Relationship Manager 01/2019 - 01/2020

Nirmal Bang - Mumbai, India

Nirmal Bang is the most popular stock broking and trading services providing company available in the country. It is offering broking services to the customers since 1986. The headquarters of the broking firm is located in Mumbai, India.

- Partnered with sales team to identify, analyze and recommend solutions to drive client product utilization.
- Building and maintaining strong client relationship by provide high level customer service ethic and generate new business.
- Preparing AMC quote as per market value.
- Follow up and service for old clients.
- Converting sales through face to face negotiation.

Relationship Manager - PCG 01/2018 - 01/2019

Mangal Keshav Financial Services and Limited, Mumbai, India

- Expansion of Mutual fund business.
- New Client acquisition for Equity and Commodity Trading.
- Maintaining relationships with existing customers through regular visits (Like - School, Collage & Sports outlet)
- Establish and maintain business relations and generate new business.
- Ensure high level of consumer satisfaction by building and maintaining good relationship with potential customers.
- Initiate and close deals.

Relationship Executive 01/2016 - 01/2018

ICICI Prudential Mutual Fund - Mumbai

- Recognition of Milestone achieved in Balanced Advantage Fund
- Valuable Contribution in ICICI Prudential MF Connect for the Month of March 2018.
- Outstanding performance in Dangaal (Mumbai Zone)

Assistant Manager 01/2015 - 01/2016

Kotak Mahindra Bank - Mumbai

- Kotak Credit card Department with the retention team (Outbound Calling)
- Achieved best target achievement % for the month of Oct, Nov & Dec' 2015
- Was awarded with a trophy & certificate of "Best Performer" in outbound team in a span of 6 months.

EDUCATION

Masters of Business Administration: Finance (2016)

Post Graduation: Mumbai University (2016)

Graduation: Bachelor of Commerce (2014)

Higher Secondary School (HSC): Maharashtra State Board (2011)

School (ICSE) : 2009

PERSONAL DETAILS

Date of birth : 08/07/1993

Sex : Male

Nationality : Indian

Religion : Jain

Marital status : Married

Visit Visa (July)

Declaration:

I hereby declare that the information furnished above is true to the best of my knowledge.

Place : Mumbai

Date :

Shreyas Mayur Vora

