

## Curriculum Vitae

### Virtual Relationship Manager

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### Brief Overview

Result Oriented Customer Professional with 2 years' experience, worked as **Virtual Relationship Manager** at ICICI Prudential AMC, Mumbai, India and with R B Capital

- **Product management**
- **Master Data Management**
- **Customer relationship management**

### Professional Experience

#### 1) R B Capital

**Nov 2020 to Feb 2021**

#### Business Development Manager – Equity sales

- Contact prospective clients to present information and explain available services
- Offer advice on the purchase or sale of particular securities
- Monitor financial markets and the performance of individual securities
- Execute purchases and sales of investment products in a timely and efficient manner
- Research and resolve issues in trading area
- Create new market making strategies for electronically traded products
- Provide clients with general information and help with their brokerage accounts
- Maintain and document activity
- To maximize the client's returns on personal investment, and provide him with apt guidance and advice as may be needed.
- Ensure that the transactions of the client result in profit generally and create an impressive portfolio of work that carries significance.

#### 2) ICICI Prudential AMC – Mumbai, India

**NOV 2018 – SEPT 2020**

### Virtual Relationship Manager

#### **Roles and Responsibilities**

- To up sell ICICI Prudential MF products to Retail/HNI Clients as per the assigned database , generation of fresh leads through reference to shore up the clientele.
- Achieving the business targets assigned in terms of up selling ICICI Prudential Products, enhancing and upgrading the Client Net worth relationships.
- Profiling customers and provide financial products to meet customer needs
- Providing Investment planning and advice

- Achieving sales and revenue targets spread across product mix, One point contact for the assigned customers

### 3) SITEL

Axis Mutual Funds – Mumbai, India

MAY 2017 – JUNE 2018

#### Customer Service Professionals

#### **Roles and Responsibilities**

- Primary responsibility is to work closely and build strong relations with the circle head & cluster business manager to build circle level strategies on products and sales initiatives to help achieve revenue and sales targets for the circle.
- Build strong relationship with all cluster managers and key branches to ensure execution of strategies rolled out by the circle
- Ensure maximum market share for Axis Mutual funds scheme within the channel
- Initiating & executing training & development on products, soft skills and regulations to the bank employees
- Regular communication on products, markets and sales tools to all Bank employees

#### Education

- B.COM (Graduated from Mumbai University in the academic year 2016-2017)

#### **Professional Education:**

<b>Certification</b>	<b>Institute</b>	<b>Year of Passing</b>
Kuoni certified program in travel and tourism	Kuoni Academy	2013
NISM Certified under section 5A -Mutual Fund Distributor	National Institute of Securities Market	2017

#### Personal Skills

Strong analytical & communication skills.

Able to work with minimal direction to complete task, assignments accurately and within established deadlines.

Capable of handling sensitive and confidential information with discretion.

#### Hobbies

Bike riding, playing cricket, football and trading in Stock Market

#### Linguistics Proficiency

English, Gujarati, Hindi & Marathi

Date: 17<sup>th</sup> Dec 2019

Place: Mumbai, India

