

## PROFILE SUMMARY



More than 9 years of CRM experience at various level of organization.

## CORE SKILLS

- Complaint Resolution
- Effective Communication
- Teambuilding & Training
- Patience & Empathy
- Ability to Keep Calm in Stressful Situations



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## PERSONAL QUALITIES



Analytical and presentation skills



Team building and Leadership skills



Excellent communication and networking skills

# Manali Maulik Mehta

Customer Services Executive

## WORK EXPERIENCE

### Back Office Assistant

#### N.J. India Invest Pvt. Ltd ( NJ wealth & Insurance )

January 2015 to January 2023

#### Anand Rathi Financial services

February 2013 to December 2014

### Job description:

#### N.J. India Invest Pvt. Ltd. – N.J. Wealth & Insurance

##### Insurance :

- Contact prospective clients about insurance products and policies.
- Process Insurance policy renewals.
- Maintains print and electronic records and files as required.
- Explain Various insurance policies and products to potential and existing clients.
- Suggest modifications and updates to clients existing insurance policies.

##### Mutual Funds :

- Identifying customer needs, assessing their risk appetite and providing them investment options.
- Providing guidance when issues, challenges or problematic situations arise.
- Manage advisor team and Ensure proper segregation of customers and active clients mapped to advisors.
- Preparation & maintain of various MIS reports for clients and advisors on monthly basis.
- Providing training to advisor and co associate for fund management and system.
- Dealing with New and Existing clients.
- Providing advisory services into various instruments majorly in Mutual funds & PMS.
- Sound knowledge of equity markets, mutual fund industry and debt markets.
- Manage database in the software to provide consolidated view of each family portfolio.

## IT SKILLS

Proficient in

- MS Office (Excel, Word)
- NJ E wealth and Partner desk
- Anand Rathi Demat
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## PERSONAL DETAILS

**Date of Birth:** 02 May 1994

**Languages known:** English, Gujarati, Hindi.

**Residential Address:** Dubai, United Arab Emirates

## HOBBIES

Travelling  
Watching Movies  
Financial Markets  
Photography

## M/s. Anand Rathi Financial services – Mutual Fund Distributor

- Preparation of forms and fill documents of client regarding mutual funds and Demat.
- Checking all clients KYC compliance as per SEBI norms.
- Opening Demat account of customer.
- Manage documentation for service related.
- Daily touch with all AMC RM for customer related queries.

## EDUCATION

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### Mumbai University, Mumbai,

- Bachelor in commerce (B. Com) – March 2014
- Certificate – NISM – Series V – A Mutual Fund Distributors – August 2017
- The Fundamental Digital marketing certification exam on 23<sup>rd</sup> March 2023.

## REFERENCES

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Available on request