**KUMARESAN S**

**Contact: +91-7845521583** **E-mail:** [kumaresh784@gmail.com](mailto:kumaresh784@gmail.com)

**FINANCIAL MANAGEMENT PROFESSIONAL**

Competent, diligent & result oriented professional with an experience of **4 years in Broking, Wealth Management & Distribution Business.** Currently associated with **MOTILAL OSWAL FINANCIAL SERVICES LTD, Chennai as Assistant Manager.** Determine to carve a successful and satisfying career with the financial discipline.

***PROFESSIONAL FORTE***

***Financial Market , Portfolio Management Service , Risk Analysis , Investment Banking , Strategic Planning***

***Business Development , Product Management.***

**CAREER HISTORY**

**MOTILAL OSWAL FINANCIAL SERVICES LTD Broking & Distribution**

**Position-Assistant Manager, Chennai June17 - Till**

**Duties**

* The Assistant manager will be responsible for acquiring preferred clients (HNI/Ultra HNI). Advising clients on various investment ideas based on the suitability to their risk profile, return expectation, asset allocation, liquidity needs etc. viz. Stock Broking, Portfolio Management Services, Structured Products, Private Equity, Bonds, Mutual funds (Equity and Debt), Offshore Investments, Commodities, Currency Derivatives, etc.
* Carry out quarterly/ annual portfolio review and analysis of the client s investment portfolio to ensure that the investments are in line with the clients expectations and risk profile.
* Maintaining client relationships and generate AUM from preferred clients. Advising HNI/Ultra HNI clients on their Investments and managing their overall financial portfolio and deepening the wallet from existing clients.
* Track the HNI/Ultra HNI segment in the market for new client acquisition to research, investigate and update themselves on available investment opportunities/financial market trend to determine whether they fit into clients portfolios.
* To coordinate with product and team for taking investment decision for the clients. To conduct and assist in organizing seminars, workshops and other business development activities.
* Worked as a acting Team Leader in certain situation and coordinate with team for to make them do business and support their calls and closures.
* Maintained MIS Reports and reconciling with clients portfolio to review Return on Investment (ROI) and Capital Gains.

**RELIANCE CAPITAL LTD – (BROKING & DISTRIBUTION BUSINESS)**

**Position-Relationship Manager, May2016-June2017 Chennai.**

**Duties**

* Entrusted with the responsibility of handling Financial Market (Money Market & Capital Market) and Wealth Management (Mutual Fund, PMS, Private Equity and Insurance) business across the region while managing day-to-day Business, and consistently increasing Business with achieving the target.
* Acquire new prospect clients to organization and getting business from them for meet the KRA and

Identify the client profile based on his requirement meet expectation with service.

* Strategically articulating the set of values that will be the foundation of future wealth management planning while implementing wealth management strategies and goals.
* Involved in Portfolio allocation and reviews & financial check-ups for each client according to the frequency set within the advisory process guidelines.
* Carried out Requirement study, client interaction, work planning, scheduling and code reviews. Maintained the portfolio of the client, improving it better with the market analyze.
* Improved the frequency of trading by continuous update of market news and recommendations to clients.
* Reviewed client needs to propose effective solutions as per their profile While Maintaining a Strict policy of adherence to Compliance coupled with exhibiting High Professional Standards along with the adherence to service commitments.

**CITY UNION BANK – BANKING (SALES & OPERATIONS)**

**Position-Clerk, Aug2014-Sep2015. Vellore.**

**Duties**

* Monitor the customer KYC norms, Acquired new corporate and individual (CASA) accounts.
* Handle the CC&OD accounts outstanding arrears, Recorded all transactions in compliance with bank procedures.
* Cross-sold bank services and products like.,(FD,Advances,Insurance) to meet month targets, Process range of retail and commercial transactions.
* Issue cashier checks, money orders, currency orders, Order and activate ATM and debit,.
* Comply with all operational, security and control policies and procedure, Manage customer inquiries and complaints.
* Processed paying and receiving transactions for all product types and services, Handle the inward & outward clearing cheque.

**EDUCATIONAL CREDENTIALS**

**MBA (Finance & Marketing)**

SRM University Chennai.(2012-2014)

**BBA – Business Administration**

Thiruvalluvar University Arni.(2009-2012)

**12th – HSC**

State Board – Thirupathur.(2009)

**10th – SSLC**

State Board – Thirupathur.(2007)

**Personal Qualities**

**S**elf Motivated , Hard worker , Committed to work, Goal oriented,

Team Player, Time Management & Responsibility.

**Accomplishments**

* Significantly Achieved and honored shield for best former of the Year(.2017-18).
* Honored 2 times for best Relationship Manager of the Region.

**Certification**

* Certified NISM V A Mutual fund(AMFI).
* Certified NISM VII Risk Management.

**Computer Proficiency**

Microsoft Office, MS Word.

**Date of Birth & Place** : 05/06/1992 & Amjikjarai Chennai.

**Languages Known:** English,Tamil & Kannada.