PRATEEK SINGHAL
DOB: 12th Jan, 1988
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Summary:

Employee Benefits Consultant:
Currently working with Kotak Life Insurance - Group Sales vertical.
Corporate consulting & acquisition for various employee benefits/retirement schemes (Both Defined Contribution & Defined Benefits)

In interactions with top operatives of companies, like Treasury Heads, Finance Heads, & HR heads for discussion on various employee benefit schemes.
Tapping PSU clients, representing Kotak in the biding process.

Procuring funds for Kotak Group, i.e. increasing the AUM for the Kotak Group, schemes like NPS, Superannuation, Gratuity & Leave Encashment require clients to deposit funds, on which the insurer earns a fund management charge (FMC).

Actively pursuing corporate clients for enrollment into the National Pension Scheme (NPS), which is a government offering. Kotak being in dual shoes for NPS, rendering services of a POP as well as a PFM.
Dealing with PFRDA, representing the Kotak PFM. Right from filing bids to relationship building.

CFP with broad knowledge in all aspects of Risk analysis, Insurance planning, Tax planning, Estate planning, Equity research and Investment management.

Financial Planning competencies:
Retirement Planning,
Advanced Financial Planning,
Unbiased Investment advisory,
Mutual Funds Research, Equity Research,
Life Insurance Needs Analysis,
Taxation on Investments.

Specialties:

Microsoft office suit (Project, Word, PowerPoint, Excel), Portfolio management, Alternative investments, Unbiased Investment advisory, Mutual Funds research, Equity research, Taxation on Investments, Financial research, Retirement Planning.

Experience:

Kotak Mahindra Old Mutual Life Insurance Ltd
Employee Benefits Consultant
(Deputy Manager – Group Insurance)
Consulting and acquiring corporate clients for various employee benefits schemes.
(NPS, Superannuation, Gratuity, GTL, Leave Encashment and EDLI).
(Feb 2013 - till date)

Responsibilities:
- Establishing and maintaining relations with top operatives of companies.
- Handling the service channel for corporate (one point of contact for the client).
- Establishing healthy relations with KMBL for mutual business opportunities.
- Coordinating with (assisting) the team to maintain corporate relations.

Citi Bank Channel - Banca (Relationship Manager – Corporate Sales)
Bajaj Allianz Life Insurance Ltd
(Aug 2011 to Jan 2013)
(1year and 6months)

Responsibilities:
-Responsible to contribute to Citibank, the best performing channel for the company
-Relationship Management with the channel partners
-Database management for sales and support
-Training Citi bank RMs to handle corporate clients for Insurance
-Responsible for giving presentations to corporate about the product
-Post Sales Services - Actively involved in solving service related issues faced by customers
-Providing financial planning and tax planning services to the clients
-Training and assisting new team members in the same profile

Academic projects:

- Impact of Interest rates on FMPs

The project was an overview of the Fixed Maturity Plan (FMP) market in India, how the FMP market has gained popularity because of lack of performance of the share markets and how the returns of FMP markets highly depend on the interest rate scenario.

- Housing Loan – Floating vs. Fixed Interest Loan

The project was an overview of the Housing loan vertical in India, the comparison between Floating & Fixed interest rates and steps to choosing the best type of loan during different interest rate scenarios.

- Financial Planning the right way

The project was a basic overview of the Financial Planning industry in India and how it functions. In this project there was a detailed description of how financial planning is done describing all the processes involved from client acquisition to making a complete Financial Plan.

Education:

- CFP (FPSB India)
  Certified Financial Planner (2010-2011)
  CFP Charter to be received after successfully completing 3 years of work experience.
  Have cleared all the 5 Modules: -
  - Investment Planning
  - Tax Planning & Estate Planning
  - Retirement Planning & Employee Benefits
  - Risk Analysis & Insurance Planning
  - Advanced Financial Planning

- International College of Financial Planning
  PG Diploma in Financial Planning
  2010-2011

- Sri Guru Govind Singh College of Commerce, Delhi University
  B.com (H)
  2006-2009

- Kulachi Hansraj Model School, (Ashok Vihar, Delhi)
  Entire schooling (CBSE)
  XII (2006)
  X (2004)

Extracurricular activities:

- Member of the ICOFP Placement Cell (2010-2011)(Taking active part in assisting placement Operations)
- Part of the Basketball team at school.
- Debate Contests and Group discussions.

Other interests:

- Enjoy playing Computer Strategy and First Person Shooter games.
- Surfing the net and gathering all sorts of information.
- Chatting or exchanging views with people.

Declaration:

I do here by confirm that the information given in this form is true to do the best of my knowledge and belief.

Place: Delhi

(Prateek Singhal)