PAWAN PRASAD

pawan.rajj92@gmail.com |+91-9769843191

BANKING SALES | BUSINESS DEVELOPMENT | CLIENT RELATIONSHIPS

Excels in evaluating client requirements & market needs and delivering strategic solutions with focus on achieving business objectives & sales targets in charged settings

PROFESSIONAL VALUE OFFERED

- **Relationship Builder** with a talent for **strengthening relationships**&**achieving business objectives** across **Banking and Sales** functions; **nearly 6 years** of experience
- Diligent in **driving sales, service of wealth products for HNI clients** by **delivering best-in-class trainings** to bank managers, sales teams, relationship teams and other investment advisors
- Displayed excellence in **optimizing complete range of products/services** to its valued clientele; highly skilled in executing various **cross-selling strategies** for generating revenues and consistently growing the portfolio size
- Recipient of "I-contribute Trophy" multiple times for achieving record profitability i.e. accomplished **200% of the target in F.Y. 2017-18**; **over 100% of target for 4 quarters** i.e. 3rd quarter of F.Y. 2017-18 to F.Y. 2018-19

CORE COMPETENCIES

Strategic Planning	*Banking Sales & Business Development*	*HNI/ Client Relationships*
Wealth Management	*Revenue Generation*	*Product Optimization*
Service Excellence	*Training & Development*	*Team Building & Leadership*

WORK EXPERIENCE

ICICI Prudential Life Insurance Co. Ltd. **Apr 2017 – Nov 2021**

Key Relationship Manager

Key Deliverables:

- Headed the sales & operations for the Wealth Management and Retail segment in the Bancassurance Channel with a 12 member team.
- Delivered trainings to branch managers, relationship manager & various investment advisors on product knowledge, customer relationship management and so on.
- Built long-term relationships with HNI clients for achieving targeted business and advised them on various wealth products; devised strategic plans for driving sales across HNI channels focusing on achieving repeat business.
- Identified prospective clients and generated business from new accounts for achieving consistent profitability; mapped new streams for revenue growth and developed plans to build consumer preference.
- Attended to clients' complaints and ensured effective resolution; interacted with the customers to gather their feedback regarding the product satisfaction; implemented best practices for retaining customers.
- Handling existing customer's portfolio and lead generating through it.
- Visit potential customer to make them understand about the various benefits available in the plan & check whether it successfully meets with the customer requirements.
- Identifying prospects for business opportunities & interact with new prospective for closing deals.
- Work on the leads provided by organization to generate business through it.
- Achieving sales targets through acquisition of new clients and growing business from existing clients.
- Maintaining relationships with clients by providing support, information, guidance and recommend new opportunities.
- Cold calling to arrange meeting and meet potential clients for new business.
- Manage relationship with bank partners and drive business through them.
- Support day to day operation of the relationship processing of applications.
- Ensure that channels employees are engaged around business objectives & results.

Professional Summary as a Wealth manager in Motilal oswal : Dec 2023 – Dec2024

Dedicated wealth manager professional experience. Skilled in financial planning for high net-worth clients.

Professional Experience

- Strong communication skills with and ability to coordinate projects and deliverables across multiple regions
- Strong ability to address risk and be comfortable with risk taking
- Strong knowledge of Excel, PowerPoint, proficient in data mining and up keep
- Strong interpersonal skills and ability to work effectively in a team environment
- Strong relationship management skills and ability to facilitate discussions with senior management participants
- Driven, highly motivated and results focused, with strong organizational and project management skills
- Highly ethical individual with strong moral compass
- Time management skill, attention to detail, and ability to perform under pressure
- Strong project management skills and ability to multi-task to prioritize appropriately
- Excellent project management and multi-tasking skills, including ability to work on multiple projects simultaneously, and bring them to resolution
- Manage Portfolio Size is Minimum 75lac and above.
- Address HNI and ultra HNI clients for investment requirements, through exclusive product bouquet and superior and seamless service delivery to assist client in achieving short term and long term investment goals via proper profiling and offering of various Investment products.
- Profiling customers and provide financial products to meet customer needs.
- Strong Knowledge of investment products like Mutual Funds, Equity, Bonds, Share Market, PMS and Insurance.
- Developed Financial plans to help clients meet their financial objectives.
- Communicated with clients to understand their key financial information like income and financial goals.
- Documented client information and managed their portfolios.
- Provide retirement planning services to the clients.
- Manage client investments through effective organization.
- Buy and sell stocks on behalf of clients.
- Work with separate clients to advise them and cross sell the wealth and financial products and services.

INTERNSHIPS

Organization: SUMERA INFOTECH PVT.LTD
Duration: 60 Days (1st June 2016 – 05th August 2016)
Project Title: Business Developmentand Customer Retention Policies.
Key Deliverables:

- Evaluated client requirements, organized meetings & conducted briefings/provided product demonstrations; sustained healthy & profitable relationships with doctors
- Monitored competitor activities, gathered customer feedback, tracked product issues & provided effective resolution in collaboration with the management
- Learned how business development and customer retention policies action taken by Sumera Infotech
- Company effectiveness to attract new customer and holding existing customer.

ACADEMIC CREDENTIALS

YEAR	EXAMINATION	INSTITUTE	BOARD/UNIVERSITY	DIVISION
2015-2017	**MBA (MARKETING)**	**Institute of Business Management Research (IBMR)**	**Pune University**	**First**
2011-2014	**B.COM (ACCOUNTS HONOURS)**	**Directorate of Distance Education**	**Patna University**	**First**
2010-2011	**XII- COMMERCE**	**Kendriya Vidyalaya**	**C.B.S.E Board**	**First**
2008-2009	**X- STANDARD**	**Kendriya Vidyalaya**	**C.B.S.E Board**	**Second**

ADDITIONAL INFORMATION

Date of Birth : 29th November 1992
Languages Known : English and Hindi

DECLARATION

I hereby certify that all the above mentioned information is true & correct to the based on my knowledge & belief.

PAWAN PRASAD