



Sumit Pawar
pawarsumit@hotmail.com
+91 888 401 2768

ACADEMIC QUALIFICATION

Course	Year of Passing	Institute/University	Subject
MBA	2011	iLEAD School of Business	Finance
BBA	2008	Barkatullah university	Finance
Higher secondary	2005	M.P. Board Bhopal	Commerce

WORK EXPERIENCE

Kotak Mahindra Bank Ltd Relationship Officer Jan'12 - Present

Responsibilities:

- Liability Products
 - Current Account Saving Account (CASA)
 - Term Deposit (TD)
 - Forex Trade
 - Lockers
 - PINS (NR)
- Asset Products:
 - Home Loan
 - Loan Against Security (LAS)
 - Commercial Equip
 - Car Loan
 - Working Capital
 - Credit Card
- Investment Products:
 - Demat and Trading
 - Smart Equity
 - Insurance
 - National Pension Scheme (NPS)
 - Gold and Mutual Fund
 - Structured Products
- Services:
 - Auto Pay/Bill Pay
 - ASBA
 - Net Banking Active
 - Beat Check Pick up/Beat Cash pick up
 - E-statement registration
 - E-tax Active
 - Phone Banking Activation
 - Home Banking Usages
 - Active Money Activation
 - Debit Card POS activation

ICICI Securities Key Relationship Manager Oct'12 - Jan'15

Responsibilities:

- Complete portfolio health check along with customer profiling
- Risk profiling and identifying the current financial health
- Preparing a detailed financial plan based on the desired financial goals of the Investors
- Recommend and address the concerns thereon and assist in implementing the agreed recommendations
- Regular portfolio tracking and timely updates on Equity Broking and Online Trading services
- In-depth analysis on Mutual Funds - Debt, Equity, FMPs & NFOs, Fixed Deposits, Bonds & Debentures and recommend them as per the requirement
- Structured products, Portfolio Management Services (PMS), Life and General Insurance Planning □

Achievements:

8th Oct 2012

Joined as Management Trainee

8th Jan 2013

Completed Uddan target and promoted as Relationship Manager

1st Jan 2014

Promoted as Senior Relationship Manager with completing 200% Target Achievements with gold slab

1st July 2014

Promoted as key relationship Manager with completing 200% Target Achievements with gold slab Contributing 30% of branch revenue target

Project 1: Ziva Thai spa

Key Result Areas:

- Extensive market research on the spa industry and different players in this industry
- Analyze the business model and franchise model of other companies
- Create a franchise model for the company
- Created business model and resource planning for the franchises of Ziva Thai spa
- Tie-up with Malls and Companies for Spa corporate plans and luxury holiday plans
- Provide consulting on business expansion strategy to the company based on research conducted on the Industry

Achievements:

Established franchises model in seven different cities in just four months Jaipur, Udaipur, Jaisalmer, Raipur, Agra

Project 2: Assessment Industry

Key Result Areas:

- Conducted in-depth research on "Assessment Industry" in India and their presence/scope in India
- Created assessment model for different stream of students depending on their grade/level
- Approached different schools and Colleges to mutually assess students as per industry standards
- Analyze the assessment data, categories them according to their level of performance making PowerPoint Presentation and provide it to the upper management for further process
- Responsible for Business Development for various educational and recruitment products
- Achievements:
 - Increased the revenue of the company by 45%
 - Expand Business in three states of India Madhya Pradesh, Uttar Pradesh, Rajasthan

INTERNSHIP: UCO Bank Hong Kong

- Coordinated with the Trade finance Operations
- Understanding and taking an active part in the bank's important operations and activities like:
 - Syndicated Loans
 - Buyer's Credit
 - Dealing room Operations
 - AML/KYC norms
 - Host country Regulations
 - Risk Management standards and
 - Deposits along with the KYC compliance

Computer Skills

Adept at developing **spreadsheet models, creating power point presentations and structuring analysis and research online**