

AAKSHI KALRA

Contact No: 09012077999

✉:aakshi.kalra27@gmail.com

Career Objective

To secure a challenging position that provides me with consistent professional & personal growth and an opportunity to contribute significantly towards achieving organization's goal.

Current Status

Standard Chartered Bank, Saharanpur

Designation & Duration: Business Development Manager (From 15 Oct'14 to till date)

Roles & Responsibilities –

- Part of Customer Acquisition, Personal Client.
- Meet the Business objective initiated by the retail client business.
- Customer focus need base selling.
- Meet new Customers in market every day and convince them for liability and wealth products.
- Derive insights to competitor sales activities and effectively counter the efforts.
- Operational quality –Errors free customer application & documentation.
- Responsive and responsible selling.
- Zero tolerance –Fraud, Mis-selling.

Worked with PNBMet Life India Insurance Co. Ltd,

Designation & Duration: Assistant Relationship Manager (From 07 Dec'12 to 09 Oct'14)

Roles & Responsibilities-

- Generate Sales lead from PNB staff .
- Manage 3-4 PNB branches and develop the relationship with Internal & external PNB staff.
- Interaction and training with Punjab National Bank employees for insurance guidelines & encouraging them for third party product.
- Scrutinize the sales forms and get them completed in all respect for

process.

- Responsible for New Business (From a New application to Customer services from PNB branch).

Worked with Reliance life Insurance Co. Ltd.

Designation & Duration: Financial Planner Officer (From 29th Jun'12 to 05 Dec'12)

Roles & Responsibilities-

- Tracking and responsible for Branch Login for New business and Recruitment Kits.
- Initial Underwriting for all New Business as well as for Agent Recruitment.
- Interaction and training with Agency sales for insurance guidelines.
- Scrutinize the sales forms and get them completed in all respect for process. Responsible for New Business (From a New application to Customer services).
- Responsible for Agency Development (From a New advisor application form to Agent's Commission).
- Conveying the new scheme, amendments and process to sales staff.
- Coordinating with staff members for Branch continuity.
- Organizing meetings and seminars.
- Handling all the policy bonds.
- Supervising the office assistants.
- Arrangement of all extra curriculum activities of branch
- Preparing charts and presentations.

Educational Qualification

	Year	Board
High School	2006	C.B.S.E
Intermediate	2008	C.B.S.E
B.COM.(C.A.)	2011	Kurukshetra university

Professional Qualification

- IRDA certification
- NISM certification

Software Exposure

Operating system : Window 98,2000,XP
Programming Skills : C, C++,V.B.6.0, Dot Net
Database : MS-Access

Personal Profile

Name : Aakshi Kalra
Date of Birth : 27th Nov. 1989
Father's Name : Late Sri Durgesh Kalra
Gender : Female
Marital status : Unmarried
Languages Known : English & Hindi.
Strengths : Cooperative Nature Ability to adapt
Address : 1/30 Shivpuri ,Patel Nagar,Saharanpur- 247001

Dated:

Place:

(AAKSHI KALRA)