# Zalak .Thackar # 9920475333.

A/17, Manoshree CHS Shree Nagar, Thane (w) 400 604.

**Summary:**

**Zalak** is a diligent and focused individual with excellent **communication** and **interpersonal skills**. An eager learner with ability to work in teams as well as individually, **Seasoned** **Relationship Manager**/**Personal Banker**/**Sales Expert** with overall **6+years** of Banking **exposure** in managing different portfolio of clients, cross selling of products like Mutual Fund, Insurance, PMS, and Asset Product like Home Loan, Loan against property etc..

**Academic Qualification**

* Certified Financial Planner (**FPSB India, USA Board)**
* **PGDM in** Finance from **Welingkar Institute, 2 years duration completed in 2104.**
* **Diploma** in Finance from **Welingkar Institute, Secured first class.**
* **B COM** with second class from **Mumbai University (K.J Somaiya College)** held in **Mar. 2006.**

**Professional Training**

* **CFP, IRDA, AMFI, INDUS PROCERTIFIED**.

**Accolades**

* Privileged recipient of CASA acquisition award every consecutive month in **HDFC** Bank.
* Surpassed the expectations by achieving 150% plus of the set target on regular basis.

**Indusind Bank February 2015 till Date. (Customer Service Manager)**

**Responsibilities**

* Responsible for relationship management for a portfolio of customer
* Responsible for cross selling, enhancing relationship with existing customers and walk-in customers.
* Selling of Investment products like Mutual funds, Insurance, Current and saving account.
* Managing Operations like account opening, fixed deposit, Lockers and Forex etc.
* Responsible for generation of referrals from internal database and new customer acquisition.
* Responsible for report generation and filing, review all critical reports, monitor cash levels, and fraud control.
* Generating Business through Cross sales of all product and services of bank.
* Retention of Account, Enhance value of existing portfolio of current and saving account customers
* Handling overall cost management and staff productivity.
* As well taking care of Branch administration and ATM (onsite) management, branch operations and Audit compliances

**Bajaj Capital June 2014 till January 2015. (Relationship Manager)**

**Responsibilities**

* Formulating the Strategies to Increase Client Base.
* Nurturing Relationship with Existing High Net worth Customers So As To Increase Revenue Base for the Company.
* New Client Acquisition and Revenue Generation through Sale of All Liability Products Including Insurance (Li & Non Li), Mutual fund, PMS, IPOs, Bonds, Gold, Real Estate, FMP & Capital Protection Fund Etc To HNI Clients.
* Preparation and Execution of Financial Planning.
* Risk Profiling Of Existing & New Clients.
* Regular Portfolio Review of Existing & New Clients.

**ICICI Bank June 2012 till to June 2013. (Officer)**

**Responsibilities**

* Achieve sales target & providing customer service.
* Responsible for cross sell & enhancing relationship with existing customers.
* Customer service to ensure walk in customer issue
* Selling of insurance product like mutual fund, insurance, current A/c & saving A/c
* Generate of referral from internal database
* Generate Business & cross sell all product & service of bank
* Enhance the value of existing A/c of c/a & Sb A/c customers
* Customer certification of document require for operation & maintenance customer A/c

**HDFC Bank July 2008 to April 2012 (Team Leader)**

**Responsibilities**

* Responsible for generating leads by self driven database.
* Ensuring closure of generated leads.
* Following up Open/ hibernate leads.
* Attending field sales calls to faster closure of generated lead.
* Cross selling of CASA, Credit Cards, and Financial Product.
* Responsible to maintain the TAT of Accounts generation.
* Coordinating with OPS team for generation of Accounts setup.
* Handling documentation related queries.
* Preparing MIS of leads & conversions to get glance overview of current status.
* Responsible for maintaining Incentive MIS of team.

**Axis bank (Credit Cards) September 2007 to June 2008 (Executive)**

* Responsible for generating leads from Branch database.
* Generation of leads form reference.

**Personal Details**

Date of Birth 31st March 1986.

Languages Known English, Marathi, Hindi.

E-mail [zalak.thakker@gmail.com](mailto:zalak.thakker@gmail.com)

Hobbies Reading and Travelling