**SWATI DIXIT** Mobile: +918411002425

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**Professional Synopsis**

* A dynamic professional with **2 1/2 years** of rich experience and Knowledge of Sales, Client Relationship Management, Business Development, Marketing activity.
* Acquired experience in interfacing with clients for selling of financial products and Expertise in managing and servicing HNI’s client.
* Good understanding of Tax, capital market, financial planning, portfolio evaluation services.
* Possess knowledge of Trade, operation & systems connected with Financial Industry.
* Strong analytical and quantitative skills, fluent with excel and wealth planning software.
* **IRDA** and **AMFI** certified.

**Organizational Summary**

**10th Dec’14 –May’15 Lenze Mechatronics Pvt. Ltd. Pune as Sales Co-ordinator.**

* Developed and sustained relationships with potential and existing clients by coordinating meetings, attending promotional events and providing effective administrative support.
* Take Monthly schedule from customer & update in SAP system.
* Prepared clear sales analysis, as well as sales reports, sales-order status, sales agreements, pre-sale material and after-sale deliveries Using SAP.
* Participated in Planning and execution of promotional activities including print, electronic media, direct mail, and electromechanical exhibitions and Trade shows Like SPS Automation India 2015.

**3rd Oct’12- 1stDec’14 ICICI Securities Ltd. Pune as Key Relationship Manager**

**Profile:** Involved into Relationship Building & Management with the customer by Sales & Services of Financial Products.

* Dealing with Wealth Management Products (Mutual Funds, e-broking, PMS, PE, Structure, FD, Life Insurance, General Insurance etc.) Asset Products (Home Loan, Mortgage Loan, Loan against securities etc.).
* Acquiring new customers and retaining the existing ones by servicing the clients.
* Managing the Portfolio of HNI’s and Branch Wealth customers and cross selling different financial product by identifying their needs.
* Assisting the clients in understanding their financial planning requirements, in developing an appropriate investment strategy and help them to implement the strategy.
* Implementing marketing activities to promote products & services.
* Utilising sales forecasting and strategic planning techniques to ensure the sale and profitability of products.
* Advice and Trained the new and existing employee.
* Participate in working group meeting with product manager, channel partners to better understand the product and service

**Achievements:**

* Promoted to next grade from SRM to KRM in one year of joining.
* Successfully handled AUM of Rs.8 Cr & Rs. 10 Cr in MF & Equity respectively.
* Awarded several times in contest for valuable contribution towards Customer services, Mutual Fund, General Insurance, Life insurance, FD.
* Winner of the national level events POWER MEET 2013, SHIKHAR 2014 for Life Insurance Business & MF SUMMIT, 2014.
* Awarded as a TAKE OFF CHAMP for generating the highest revenue in the month of joining itself.
* **Worked as lecturer in Gyan Ganga College of Technology and Science for 10 Months after Completing My Engineering Degree.**

**Academic Details:**

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| --- | --- | --- | --- |
|  | **INSTITUTES** | **PERCENTAGE** | **MAJOR** |
| PGDM  2010-2012 | Balaji Institute of Modern Management, Pune | 63.33% | Marketing |
| B.E  2008 | Takshshila Institutes Of Engineering & Technology, Jabalpur | 72.34% | Computer science |
| Class XII  2004 | Maharani Laksmi Bai School, Jabalpur | 76.00% | Science |
| Class X  2002 | St. Norbert’s School, Jabalpur | 75.80% |  |

**IT Skills:**

| **Database:** | Oracle, Pivotal |
| --- | --- |
| **Other Tools** | C, C++.  MS Office(Excel, word, power point)  Finacle FCRM Version 10, Trade Racer. |

**Summer Internship:**

**Company:** Haier Appliances India Pvt. Ltd, Pune. **May 2011 to June 2011**

**Project Title:** Study of ‘sales process and organization buying behavior’.

**Summary:** The projects mainly focuses on finding the potential market for the product and also promote the Haier laptops in the target market thereby creating brand recall and recognition for the product. The project also involves a study of positioning strategy with respect to competitors & organizational buying behavior for laptops in educational institutes in and around Pune.

**Extra-Curricular Activities:**

* Secured 1st Position In ‘Robotica’ (Line Follower), National Event-“Tech Meister”-2008, Organized By Guru Ramdas Khalsa Inst Of Science & Tech.
* Secured 2nd Position In Intra College Singing Competition.
* Volunteer at Back Stage Committee in “Marketing Congress”-2010.
* Actively Participated In “National Service Scheme”-in school.

**Hobbies:**

Playing Badminton, Singing, Learning new Technologies, Interacting with new peoples

**Personal Details:**

**Date of Birth:**  11-07-1987

**Address:** A-1002,Regaliya society, Datta Mandir road,waked,Pune-411057

**Languages Known:** English, Hindi.