**AARTI BAJAJ**

Mobile: 7666118949

Email: [**aartibajaj.19@rediffmail.com**](mailto:aartibajaj.19@rediffmail.com)

Highly competent Professional offering an experience of over 2 years in the Non-Banking Financial company. Excellent communication skills summed up with splendid knowledge in the areas of **Liabilities, Assets, Portfolio Management, and Client Relationship Management, Investment Analysis, New Client Acquisition, Portfolio restructuring advisory and Financial Management.**

Innovative and exceptionally creative to foster ideas that impel the organization towards a result-oriented direction. Impeccable client management and leadership skills with impressive professional-speaking abilities.

With a brilliant professional record I aspire to join as Middle Level Managerial Position where in my diligence and exceptional domain knowledge contribute to the growth of the organization.

**ACADEMIC**

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| --- | --- | --- | --- |
| **Degree/University** | **Institution** | **Year** | **Score** |
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| PGDM-FINANCE | ITM Business School, Kharghar,Navi Mumbai | 2013 | 62% |
|  |  |  |  |
| B.B.A. (Indore University-D.A.V.V.) | M.K.H.S. Gujrati College,Indore | 2011 | 65% |
|  |  |  |  |
| Class XII (CBSE) | St.Raphael's H.S.School,Indore | 2008 | 68% |
|  |  |  |  |
| Class X (CBSE) | MGPS,Bhopal | 2006 | 73.83% |
|  |  |  |  |

**CERTIFICATION**

* AMFI Certified
* IRDA Certified

**KEY SKILLS:**

Insurance, Finance, Investment, portfolio, sales, Assets

**ORGANIZATIONAL EXPERIENCE**

**(April 13 – till date) Presently Working with Reliance Money Solutions Pvt. Ltd.**

**Key Relationship Manager**

**The job role included-**

* Managing more than 400 Active High Net Worth customers of the branch.
* Achieving the Business targets assigned in terms of cross selling, enhancing and upgrading the High Net Worth relationships.
* Profiling Customers and provide financial products to meet customer needs.
* Ensuring the highest levels of service to the High Net Worth customers.
* Providing financial planning & Investment Advisory.
* Sales targets spread across Liabilities, Retail Assets, Real asset, Forex, Online trading etc.
* One point contact for all requirements of High Net Worth customers in the Branch.
* Acquisition & Servicing of High Net Worth customers.
* Going beyond the professional need of the customer by providing other products.
* Enhancement of customer value.
* Relationship managers holding HNI relationship.
* Customer acquisition through referrals.
* Customer Retention.
* Develops new and expands existing High Net worth Customer relationships for liabilities and commercial assets.
* Cross sells new products to existing customers.
* Informs customers of new products or product enhancements to further expand the relationship.
* Maintains complete long term relationship record for assigned customer leads.

**Achievements**:

* Target over achieved by 800% in Wealth products.
* Successfully conducted product awareness sessions at different corporate like Capgemini, Morgan Stanley, Parag Milk Foods Pvt. Ltd., Liberty Videocon, Reliance Communications, etc.
* Top RM for continuous 4 months PAN India.
* Built quality relationships with support areas that actively contributed to delivering superior service to our customers.
* Generated good clientele.
* Delivered and coordinated cross-selling activities of relevant businesses and increased the revenue.

**Extra Curriculum:**

* Participated in Inter College Debate Competition
* Participated in Business Quiz
* Event Managing

**PERSONAL PROFILE:**

Father’s Name: Mr. Sohanlal Bajaj

Mother’s Name: Mrs. Varsha Bajaj

Date of Birth: 19/03/1991

Gender: Female

Marital Status: Unmarried

Nationality: Indian

Languages Known: English, Hindi

Permanent Address: 40, Sachidanand Nagar, Kesharbagh Road, opp. RTO Office, Indore M.P. 452001

**DECLARATION:**

**I hereby declare that all the details furnished above are true to the best of my knowledge.**

Place: Mumbai ***Aarti Bajaj***

Date: 20th May, 2015