**Mrs. Jorly Lenu Mathew**.

E-mail: [jorlymathew@hotmail.com](mailto:jorlymathew@hotmail.com)

Mobile. No- 09325618613

KEYSKILLS

Operations Management, Administration Management, Office management, Client servicing,People management

OBJECTIVE

I believe that change is part of the learning process, which one can never have learnt too much at any stage in life. My ideal job is where I have the opportunity to learn something new every day and continually apply this knowledge to the betterment of self and place of Organization.

PROFESSIONAL EXPERIENCE

RELIANCE SECURITIES LTD. OCTOBER 14 till date SERVICE MANAGER

**Role**:

* Manage and scrutinize Demat & Trading account opening.
* Manage and monitor the customer account activation process
* Preparing monthly MIS dispatching periodically as per HO requirement
* Create and manage certain MIS reports on a Pan India level
* Handling customer queries( walk ins and telecom) and implement relevant action to resolve issues
* Direct interaction with customer for feedback, issue and queries etc.
* First point of contact for Pune Reliance Securities client for account related queries
* Conduct trainings for company staff and franchisee owners regarding account opening

RELIANCE COMPOSITE 26th Nov 12 to 29th June 13 SALES COORDINATOR INSURANCE BROKING (RCIB)

**Role:**

* Co-ordination & Interaction with Superior authority, Principle head offices, Fund houses, Employees, regarding Financial Products and related queries.
* Key intermediate person for Head Office, Employees and Clients.
* Providing and arranging training to employees regarding Financial products.
* Organize and sharing Minutes of Meetings and Action plan with team members.
* Managing the correspondence between the sales team and their clients.
* Handling Software of Accounts CRM and Financial products.
* Handling and Organizing MIS of Financial Products----Distribution- LI, MF, Wealth & MGP. &Acquisition - Demat & Commodity.
* Checking forms of financial products & taking care of documents of the customers-Distribution as well as Acquisition.
* Keeping records of employee’s paperwork including Joining & Exit.
* Monitoring Stationery, Vendor billing, Housekeeping materials and providing regular feedback to ensure smooth function of process outsourced.
* Maintain all correspondence related to billing, invoicing and payments.

**KOTAK SECURITIES LTD 20th April 10 to 20th Nov 12 ASSISTANT MANAGER**

**Role:**

* Handling KYC & Checking of Demat & Trading account opening forms.
* Handling software & accounts (Petty Cash).
* Preparing monthly MIS (Pune & Nashik) & dispatching periodically monthly reviewing portfolio.
* Direct interaction with customer for feedback, issue and queries etc.
* Heavy focus on customer service and implemented actions.
* Employee counseling - understanding issues and advising on further steps**.**
* Handle relieving formalities, including exit interviews, providing feedbacks to HODs and F&F settlement.
* Handling activities like letter of appointment and taking care of employee’s paperwork.
* Providing proper trainings to the new trainee.
* Handling housekeeping management.
* Providing customers with exceptional service and competitive edge by increasing customer loyalty.

INDIA INFOLINE LTD 20th July 09 to 28th Feb 10 ASSISTANT MANAGER

**Role:**

* Supervising the opening of new Demat & Trading accounts and client activation.
* Liaising with prospective clients to generate leads for other products like mutual funds, IPO and insurance products. Subsequently converted them to sales.
* As Relationship Manager, generated revenue more than 3 times of the CTC earned.
* Contributed to a significant increase in volume of business.
* Registered an increase in sales of the organization.
* Added 50 new clients in first 6 months.
* Providing training to the clients regarding Demat & trading.
* Service responsibility for a large base of HNI corporate customers.

KAMATH & DURAGKAR INVESTMENT 1st Oct 07 to 30th June 09 Assistant Manager

MEDIKIO SYSTEM PVT LTD 1st June 05 to 1st Sept 07 Office Assistant

ACADEMIC SNAPSHOT

|  |  |  |  |
| --- | --- | --- | --- |
| **DEGREE** | **BOARD / UNIVERSITY** | **Year** | **GRADE** |
| PGDBM | MUMBAI UNIVERSITY | 2008 | II |
| B.Sc. | NAGPUR UNIVERSITY | 2005 | II |
| HSSC | MAHARASHTRA BOARD | 2001 | II |
| SSC | MAHARASHTRA BOARD | 1999 | II |

CERTIFICATIONS

|  |  |  |
| --- | --- | --- |
| **SKILLS** | **YEAR** | **PERCENTAGE** |
| Tally 7.2 | 2008 | 79% |
| Diploma in Office Automation | 2005 | 65% |
| MSCIT | 2005 | 98% |

TRAINING

Have done 100 hours of training programme in Direct broker, Reinsurance broker and Composite broker from NIA (National Insurance Academy) for Insurance brokers. (RCIB)

**Personal Demographics:**

PERSONAL DEMOGRAPHICS

* Address :D2/3,Hill Mist Garden,N.I.B.M. Raod,Kondhwa,Pune-411048
* Language Known : English, Hindi, Marathi & Malayalam
* Date of Birth : 18th July 1983.
* Marital Status : Married
* Hobbies : Listening to music, playing badminton

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