**SANDEEP PRATAP KATOCH**

Email: sandeep\_katoch\_mum@yahoo.com Mobile: +91 9833001643

Aspiring for assignments in Relationship/Portfolio Management with an organisation of high repute; preferably in the financial industry.

**PROFILE SUMMARY**

A result oriented professional with over 8 years of rich experience and proven track record in Wealth Management, Banking, Life Insurance. Extremely Strong in Relationship Management, building trust, consistency in performance and long term thinking. Ability to connect with UHNI/corporates and providing them excellent investment advisory services. Strong Entrepreneurial skills combined with the ability to think laterally and out of the box. Have expertise in formulation of sales, marketing and Cross Sell strategy for various banking/ financial products such as Mutual Funds, Life Insurance, Non-life Insurance, Broking, Liabilities, Mortgage, Credit Cards and other lending products. Possess strong interpersonal, communication and analytical skills. Successful in building relationship with senior decision makers, product heads, business heads in making decisions to increase revenue and reduce cost.

**EMPLOYMENT DETAILS**

**Standard Chartered Bank – Centre Point Branch, Santacruz, Mumbai**

**Designation – Priority Relationship Manager – August 2015 to present**

* Manage relationships with HNWI customers (including NRI customers) of the Bank with focus on providing wealth management solutions to these customers.
* To understand a suite of wealth management products, identify the needs of HNWI customers and appropriately and compliantly sell I & I products to the existing Priority customer base.
* Manage and deepen existing relationships, acquire new to bank relationships and achieve volume growth and income targets.
* To mine the existing high end mass market customer base to identify relationships that may be upgraded to the Priority segment leading to enhanced share of wallet.
* Provide feedback to the Product&Advisory team in structuring and successful delivery of onshore and offshore products to the customers.
* Successful in bringing in new customers with big ticket investments and converting dormant customers into active and revenue generating ones by providing need based solutions and service.

**IndusInd Bank – Bandra Branch, Mumbai**

**Designation – Relationship Manager (Elite) – January 2014 to August 2015**

* Wealth Management of UHNIs covering Equities, Fixed Income, Alternative asset( Structure Products, Gold, Currency, Real Estate) and Insurance Planning.
* Conduct comprehensive review of client portfolios, including meeting with clients, to assess strategies based on objectives and risk profile, identify opportunities, and prepare customized asset allocation.
* Possess knowledge of all wealth product (Mutual funds, PMS, Insurance, broking and equity analyses
* Dealing with clients with specific business requirements like (LAP, LAS, CC, OD, PCFC, Pre-shipment financing and Post shipment financing, PCFC,FCTL, BG, Term Loan, LC, Trade Forex, Forward cover and Dollar hedging options.

**Aditya Birla Money – Mumbai**

**Designation – Wealth Relationship Manager – February 2010 to January 2012**

* Conduct comprehensive review of client portfolios, including meeting with clients, lawyers and advisors to assess strategies based on objectives and risk profile, identify opportunities, and prepare customized asset allocation suggestions.
* Exceptional understanding of wide range of investment vehicles, including equities, structured products, foreign exchanges, and derivatives.
* Prepare and conduct presentations to clientele and key stakeholders, arranging hand-off to peers if required based on client’s needs.
* Successfully explain and promote complex financial products to customers.

**Aviva Life Insurance – Mumbai**

**Designation - Assistant Sales Manager - September 2006 to January 2010.**

* Co-ordinating risk management, Insurance Planning, Pension Planning and Revenue Generation through Banc assurance through channel Partner (ABN – AMRO BANK).
* Work to achieve targeted premium with appropriate channel penetration as per potential.
* New acquisition and avenues within geographies and within existing channel and sales automation.
* Cross sell and up sell retail line of products.
* To over achieve the bench marked figure for renewals.
* Planning and presentation in terms of targeted premium, and also act as a support function for shared services in terms of MIS, feedback and business intelligence.
* Customer service for the escalated cases of claims and policy servicing.
* Training and provisioning of sales tools, marketing materials, R&R and contests for channels.

**ACHIEVEMENTS**

* Won the LOYALTY AWARD for being a consistent performer for 3years at Aviva Life Insurance.
* Awarded the prestigious BLUE RIBBON AMBASSADOR CEO RECOGNITION with a ‘Trip to Turkey’ for achieving highest target for the year 2007 of INR 1,23,00,000 against the budgeted target of INR 35,00,000.
* Won the trip to Bangkok, Singapore, Star cruse for being the highest achiever for every quarter PAN India.  
  Awarded for the Customer Centricity Awarded BLUE RIBBON AMBASSADOR CEO RECOGNITION for being No 1 PAN India Level for the year 2008 with a ‘Trip to Switzerland’ for achieving the highest target of INR1, 78, 00,000 premium collection against a budgeted target of INR 53,00,000.
* Highest incentive achiever for the year 2007 and 2008 PAN India.

**CERTIFICATIONS**

* AMFI & IRDA certified.

**EDUCATION**

Pursuing Charter Financial Analyst level 1

2012 Masters in Marketing Management – K.J.Somaiya Institute of

2008 Diploma in Marketing Management - Welingkar Institute of Management Development and Research

2006 Bachelor of Commerce from Mumbai University.

**HOBBIES AND INTERESTS**

Adventure Sports, Listening to music, Singing and Socialising.

**PERSONAL DETAILS**

Date of Birth – 05th February, 1983. Marital Status – Single

Address - 03/94, Samrat Society, Tilak Nagar, Chembur, Mumbai – 400089.

Languages Known – English, Hindi, Marathi