**ANUPAM MATHUR**

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Private Banking/ Wealth Management

**EXPERTISE IN**: Portfolio Management |Private Banking | Relationship Management |Client Acquisition | Wealth Management |Business Development |Customer Relationship Management |Risk Analysis | Delegation| Planning | Problem Solving and Decision Making | Team Management | Training, Knowledge Sharing | Excellent Communication Skills | Leadership Skills |

**PROFESSIONAL OVERVIEW**

* Dynamic & result oriented professional **offering 5.5 years of experience** and possess comprehensive understanding of diverse facets of banking including **Private banking/ Wealth Management**, financial & risk advisory for client portfolios, revenue targets achievement, forecasted yield, cost and return on investments
* Currently spearheading efforts with **HDFC Bank- Private Banking Group as an Associate Director** andassist **Ultra HNI** clients to plan and manage their investment portfolios and lifetime cash flow using low cost, asset allocated investment strategies.
* Talented relationship manager and business development manager with exceptional understanding of business development, financial planning and demonstrated track record developing profitable relationships with high-net worth individuals.
* Always awarded for a top-notch performance in private banking/ wealth management space
* Ability to network at the highest level and build discrete, solid relationships are my value propositions in a fairly competitive banking landscape.
* Experienced & seasoned provider of investment solutions to Ultra HNI's & Private Businesses.
* Focus on providing value added opportunities in wealth management for individuals and cash surplus businesses.
* Proven track record of being banker of first choice through the market swings of yesteryears.
* Well versed with various aspects of the retail liabilities & assets businesses as well.
* Proficient in MS Office, Open Office (Excel, Word and PowerPoint)

**PROFESSIONAL ENHANCEMENT (Certification & Training)**

* Certified by Association of Mutual funds of India for sale/ advisory over mutual funds.
* Certified by Insurance regulatory & Development authority of India
* Wealth Management Certification by ICICI Bank Ltd.
* CIEL Certification: HDFC Bank

**CAREER HIGHLIGHTS**

* Worked closely on a zonal project for CRV based pricing of lockers for increasing the occupancy.
* Formulated a Model for showcasing the return on various Investment into insurance linked plans based on the five years NAV of the funds to increase cross selling opportunities and debt taxation calculator showcasing indexation benefits.
* Pivotal in achieving a 120% of annual revenue target in FY13-14 and 140% in annual revenue target in FY14-15 with ICICI Bank.
* **Rank-1 PAN India** in WM category **FY** **2013-14 and 2014-15** at ICICI Bank in BSC rankings
* Ranked second in north region for highest revenue generation in first quarter’ 14 and acted as Member of Prestigious Regional Business Head club PAN India Q1 FY ‘15
* **Achieved Award of Excellence in**:
* Outstanding performance AUM generation for FY14-15
* “Dazzling” December contest based on third party product sales, FY15
* Sales target achievement/ exceptional performance in new acquisition and relationship management
* Winner at Power Meet 2014 for exemplary performance in WM category

**AREA OF EXPERTISE**

**New Business Development**

* Prospect for potential new clients and turn this into increased business.
* Identify potential clients and the decision makers within the client organization & research and build relationships with new clients.
* Plan approaches and pitches and work with team to develop proposals that speaks to the client’s needs, concerns, and objectives.

**Business Development Planning**

* Identify opportunities for campaigns, services, and distribution channels that will lead to an increase in sales.
* Use knowledge of the market and competitors, identify and develop the company’s unique selling propositions.

**Private Banking**

* Acquire high net worth customers in the catchment and onboard them &cross sell products to achieve business volume and income targets.
* Act as point contact between Bank and customer, oversee high net worth customers of the branch and act as an ambassador of the high standards of wealth management solutions.
* Maintain internal control standards, including the timely implementation of internal and external audits.
* **Oversee the wealth portfolio of C level Executives & Self Employed Individuals having significant net worth with the bank up to a net worth of INR 15 crore.**
* Work closely with respected units and ensure that client issues are discussed and new strategies are implemented to grow business.

**CURRENT EMPLOYMENT**

**HDFC Bank, New Delhi**

**Associate Director, Private Banking Group {Grade: Sr. Manager} (August 2016 – till date)**

* Engage in managing the wealth portfolio of C-level Executives and Ultra HNI customers.
* Impart financial & risk advisory for client portfolios & recommend new financial investment instruments based on market & economic trend research.
* Involve in achievement of specified revenue targets through third party products and banking solutions.
* Draft research report on the new investment products comprising the forecasted yield, cost and return on investments and liaise with internal product and operations teams to ensure end to end implementation of transactions.
* Communicate with clients, promoters & senior management executives for investment solutions

**PREVIOUS ASSIGNMENTS UNDERTAKEN-**

**ICICI BANK, Delhi**

**Sr. Manager (M II) - Wealth Management (April 2011 – July 2016)**

* Relationship / Financial Planning & Wealth Advisory
* Generating both asset and TPP business from HNI clients as single point of contact for portfolio
* Management of Rs. 100 cr. + portfolio of HNI clients
* Marketing and Product Strategic Planning

**ROYAL BANK OF SCOTLAND (RBS) TRAINEE- Consumer Banking Operations (June’ 08 – Oct’ 08)**

* New Account Opening (Operations): Business Unit- INDIA
* Document verification and indexing : Business Unit-NETHERLANDS

**RELIGARE SECURITIES LTD. | INTERN (Feb‘10–May‘10)**

* DEPARTMENT: **Risk Management- Equity**
* PROJECT TITLE: **Technical Analysis** of the Impact of Major Events on Market V – An Indian Perspective
* Project Details: Project aimed at looking at how major events caused volatility (if any) in stocks taken (Nifty 50) in the last three years (Jan ’07 – March ’10)

**ACADEMIC CREDENTIALS**

* **MBA -Finance** from **IBS Kolkata,2011 {CGPA: 8.84}**
* **BBA** from New Delhi Institute of Management**, GGSIPU, 2008 {66.54%}**
* **12th:** Ahlcon Public School, Delhi, **2005 {76%}**
* **10th**: Ahlcon Public School, Delhi, **2003 {73%}**

**PERSONAL DOSSIER**

**Date of Birth:** 13-05-1987| **Language Proficiency**: English, Hindi

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