SHRIRAM RAVINDRAN

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**JOB OBJECTIVE**

Seeking senior level assignments in Branch Banking / Wealth Management / Profit Centre Operations / Strategy Planning with a leading organization of repute in Banking and Financial sector

**PROFILE SUMMARY**

* A competent professional with more than 14 years of experience in:

Branch Administration Banking Operations Wealth Management

Investment Advisory Services Financial Analysis Training & Development

Business Development Client Relationship Management Team Management

* Presently associated with **Axis Bank Ltd., Mumbai as Deputy Vice President – Affluent Business**
* Exposure in providing advisory services to the HNI clients in investment / wealth management solutions, thereby enhancing returns on investments
* Proficient in managing branch operations with focus on profitability & achieving company’s mission as well as the strategic directions
* An effective communicator with honed interpersonal, planning, innovative leadership and motivational skills

**CORE COMPETENCIES**

**Team Management:**

* Capability building of Relationship Managers and Customer Service Managers through Learning and Development
* Handholding of Relationship Managers and Customer Service Managers through on the job training and joint calls with clients.
* Leading and Motivating Relationship Managers and Customer Service Managers to deliver performance which exceeds Organization expectations

**Wealth Management:**

* Undertaking investment advisory services that incorporate financial planning & financial services and generating profitability through investment business as well as planning activities so as to achieve the sales targets

**Banking Operations:**

* Overseeing the entire gamut of retail branch operations spanning like Cash Transactions, Bank Deposits (CASA), Loan Process, Credit Operations, Inward & Outward Cheque Clearing and Cash Management Service
* Managing complete territory operations by ensuring the financials of the branch are under control in adherence with the Know Your Customer (KYC), Anti-Money Laundering (AML), due diligence & quality norms at all times

**Branch Administration:**

* Preparing a comparative analysis statement of branch performance with previous year & branch targets, etc. as well as various other performance reports for different quarters; administering routine branch operations to maximise resource utilisation
* Formulating & implementing the investment strategies for the clients and reviewing the investments of HNI clients at regular intervals

**ORGANIZATIONAL EXPERIENCE**

**Jun’16 – till date Axis Bank Ltd., Mumbai as Deputy Vice President – Affluent Business**

**Key Result Areas:**

* Responsible for Affluent Business in Strategic branches of Mumbai , Fort and Nariman Point.
* Leading and supervising a team of 9 Relationship Managers and 3 Customer Service Managers.
* Looking after the CASA growth, service quality, process adherence, third party product sales , asset sales and SME fee.
* To generate a revenue of INR 48 mln through third party product sales and revenue of 22 mln through asset sales.

**Highlights:**

* Holds the merit of winning:
* National Mutual Fund Contest ‘Force One’ in the Leadership Category in financial year 2016 – 17.

**Dec’06 – May’16 ICICI Bank Ltd., Mumbai**

**Growth Path :**

Dec’06 – Mar’08 Manager Band I, Wealth Manager

Apr’08 – Mar’09 Investment Counselor

Apr’09 – Mar’10 Premier Wealth Manager

Apr’10 – Apr’11 Promoted to Manager Band II, Premier Wealth Manager

May’11 – Mar’13 Branch Manager – Wealth Management for Nariman Point Cluster

Apr’13 – May’16 Promoted to Chief Manager – Band I , Branch Manager – Wealth Management for Nariman Point

Cluster

**Key Result Areas:**

* Heading & supervising a team of 10 Relationship Managers and 3 Client Service Managers
* Handling the wealth management clients of all the 6 Retail Branches under the Nariman Point cluster
* Looked after the CASA growth, service quality, process adherence, third party product sales , asset sales , trade and BLG fee.
* Managed a total book size of INR 8000 mln and generating a revenue of INR 30 mln.

**Highlights:**

* Bagged appreciation letter from MD Ms. Chanda Kocchar for completing more than 5 years in the company in Aug’12
* Acknowledged with award from:
* Actor Salman Khan for outstanding performance in Life Insurance Sales in the Leadership Category in the financial year 2011 - 12
* Actor Amitabh Bacchan for marvellous performance in Life Insurance Sales in the financial year 2010 – 11
* Recognized as:
* No. 1 Wealth Branch Manager Pan India in terms of processes for the financial year 2012 – 13
* 2nd Best Wealth Manager Pan India for the financial year 2010 – 11
* No. 1 Wealth Manager Pan India for the financial year 2009 – 10
* Holds the merit of winning:
* National Wealth Management Contest ‘ The Exceptionals’ in the Leadership Category in financial year 2015 -16
* National ICICI Prudential Mutual Fund Contest “Zenith” in the Leadership Category in financial year 2015-16
* National General Insurance Contest “ General Insurance Premier League” in the Leadership Category in financial year 2015 -16
* National Wealth Management Contest ‘Rise to Glory’ in the Leadership Category in financial year 2014 -15
* National Wealth Management Contest ‘ The Exceptionals’ in the Leadership Category in financial year 2013 -14
* National Life Insurance contest ‘The Inner Circle - ED Club’ in Leadership Category in financial year 2013 -14
* National ICICI Prudential Life Insurance Contests in Leadership Category in financial year 2012-13
* National Assets Contest ‘Wealth Premier League’ in the Leadership Category in financial year 2012-13
* National Wealth Management Contest ‘Vertical Limit’ in the Leadership Category in financial year 2012-13
* Holds the merit of winning:
* ‘Best of West ‘ in the Leadership Category in financial year 2015-16
* Zonal Initiatives ‘Mumbai Dreams’, ‘The Times of Mumbai’, ‘The X-Factor’ and ‘The Fight to Finish’ in the Leadership Category in financial year 2014 -15
* Zonal Initiatives ‘Udaan’ , ‘Rise with Honour’ in the Leadership Category in financial year 2013 -14
* Inducted as a trainer for:
* Advanced Branch Leadership Program to train & guide Retail Branch Managers on Investments & Services and Wealth Management in financial year 2012-13
* Wealth Management Academy to train new recruited Wealth Managers in the organization in financial year 2011-12
* Nominated to train the Faculty of Narsee Monjee Institute of Management Studies ( NMIMS ) on Wealth Management for the ICICI Bank Young Leaders Program in financial year 2014-15
* Awarded a trip to Hong Kong for ICICI Prudential Competency Enhancement Workshop in financial year 2012-13
* Nominated for the:
* Leadership Mentoring Program in financial year 2010-11. Part of talent pool of ICICI Bank.
* ING Private Banking Training in financial year 2010-11 for excellence in ING PMS sales
* Received multiple awards for outstanding performance in:
* Mutual Fund Sales for the financial year 2010 – 11
* Life Insurance sales for the financial year 2009 – 10
* Played a vital role as a Wealth Manager and published best practices in the Wealth Management Newsletter ‘Horizon’ in the financial year 2009-10 under the segment ‘Performers Speak’
* Accredited with an award from the ED V Vaidyanathan for services beyond the call of duty for ‘Winback Project’ in the financial year 2008 – 09
* Actively involved in providing feedback for the development of online platform ‘Invest@ease’ for investment in mutual funds for Wealth Management clients in financial year 2010-11
* Provided valuable inputs to Mckinsey team for the roll out of new Wealth Management Model in ICICI Bank in financial year 2010-11.

**Mar’05 – Dec’06 HDFC Bank Ltd., Mumbai as Personal Banker (Branch Banking)**

**Key Result Areas:**

* Looked after the:
* Sales operations of third party products like PMS, Mutual Funds, Insurance and Bonds
* Customer service, branch operations & sales activities with high net worth client portfolio and cross-sell the company’s products to them

**Highlights:**

* Bagged appreciation certificates from Zonal Head for overachieving sales target in Sep’06 &Oct’06
* Acknowledged as:
* Best Personal Banker in Mumbai region and 2nd best in the West Zone Region in Jul’06
* 2nd Best Personal Banker in South Mumbai Cluster in May’06
* Top 3 Personal Bankers in the Mutual Fund Contest held in Oct’05
* Holds the distinction of winning Star of the Month contest for sourcing the maximum no. of NR accounts in South Mumbai region in Jun’05
* Merit of receiving Runner–Up Position at the HDFC Bank Football Championship – 2005

**PREVIOUS EXPERIENCE**

**May’03 – Feb’05 Standard Chartered Bank, Mumbai as Officer – Liabilities Sales Department**

**Sep’02 – Mar’03 Ogilvy & Mather Pvt. Ltd., Mumbai as Client Servicing and Media Planning Executive – Ogilvy Outreach**

**ACADEMIC DETAILS**

2002 MMS in Marketing from NL Dalmia Institute of Management Studies & Research, Mumbai, affiliated to Mumbai University; secured 69.40%

1999 B.E. in Chemical from KES College of Engineering, Pen, affiliated to Mumbai University; secured 53.55%

**PERSONAL DETAILS**

Date of Birth: 18th March 1978

Address: Flat no 401,OM Shivam Apartments,IRLA, BB & CI Rly Qtrs. , Opposite Pappilon Restaurant, Vile Parle (West), Mumbai – 400056

Languages Known: English, Hindi, Marathi and Tamil

Location Preference: Mumbai / Singapore / Dubai