**KALPESH TANDLEKAR**

Present Add: K/ 403, ICB Island Nr.Vandemataram City New S G Highway Gota Ahmedabad -382481

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**Professional Summary**

**Talented Wealth Manager with strong history in both corporate & personal growth having exceptional understanding of investment / financial planning and demonstrated strong track record of developing profitable relationships with high-net worth individuals, branches & cost centres with strong business acumen ship for organization, facilitating action plans to support organizations growth and key objectives, adepted with business development, diversification and maximized growth in a number of various industries.**

**Educational Qualifications**

* Graduation from M. S University B.Com in 2000
* NSE AMFI Mutual Fund ( Advisors ) Certified
* NSE NCFM Certified
* NSE Investment Analysis & Portfolio Management Certified
* NSE IRDA Life & General Insurance Certified

**Professional Qualifications**

**ICICI Bank Ltd – Wealth Management Branch Nov 2012 – Present**

**Wealth Manager ( Ahmedabad & Baroda )**

**Functional Roles & Responsibilities:**

* Actively participated in product, product deck &fund managers concalls, daily huddles, weekly / monthly staff meetings to review new products, investment options in achieving banks objectives.
* Maintained knowledge and co ordination of various company products & services through pre-existing network of national / locals contacts providing relevant information about the overall market trends & dynamics, general economic trends, equity market trends, and overall financial industries.
* Restructured, Planned and initiated business activities to build a diverse, quality portfolio compromising of wealth products, retail liabilities, asset products, remittance ,international concierge, cards services and other various bank products/ services to high- and ultra-high-net worth client tele in baroda &ahmedabad region.
* Sound understanding of taxation, banking, investment/financial management & retail assets, which helps to develop clients portfolio, strategies that to successfully met their wealth objectives with wide range of investment vehicles based on clients specific investment needs, risk profiling, liquidity & time horizon.
* Prepared data for high-net-worth individuals with regard to asset allocation and wealth management services, conducted regular client meetings, consistently seeks to understand clients needs, disciplined approach to client follow ups, deal executions, cross sell financial & investment portfolios, review, developed and presented both oral and written reports on there existing investment portfolios.
* Maintained and conducted business in a highly professional and courteous manner, focused on business relationships, provided significant increase in customer services by identify issues and resolved client issues, resulting in highest retention rate, increase of AUM & client base resulted into significant revenue generation.
* Established and maintained relationships with the internal team members to maximize referrals, drive business through branch networks to ensure that it becomes a sustainable area of growth through cross selling of various wealth / retail banking products to new & existing client base.
* Completed all back office process oriented tasks including but not limited to filling out forms, maintaining investment records, maintained confidentiality of all client information & verified kyc, rekyc, online investment registration, risk & life style profiling.

**IDEA Cellular Ltd – National Enterprise Business Unit Aug 2011 – May 2012**

**National Account Manager ( Sales )**

**Roles & Responsibilities:**

* Initiating, developing relationship with key decision makers, combing & churning competitors Corporate accounts.
* Managing & mapping existing large corporate accounts for Ahmedabad & Baroda region to increase market & revenue share of Company.
* Enhancing & maintaining exceptional relationship management with existing large corporate accounts.
* Ensuring self & higher up visits & introducing new product line to existing accounts to increase revenue share.
* Updating Escalation Matrix to the customer for seamless services.
* Maintaining & updating account mapping sheet for all visited corporate accounts.
* Ensuring that the Service & Relationship team visits regularly to resolve the issues.
* Coordinating with Corporate/ Sales / Service & Marketing teams across India to increase market share of Company.
* Recruiting & increasing productivity of BDO.

**ICICI Prudential Life Insurance Company Ltd Sep 2009 – May 2011**

**Agency Manager Priority Clients**

**Roles & Responsibilities:**

* Selling Insurance, Pension Fund, Child Fund, Mutual Funds, General Insurance, Fixed Deposit as well as other financial products to the new HNI Clients.
* Enhance relationship with HNI Clients through multiple financial services.
* Developing new relationship with HNI Clients for cross sale of all range of products.
* Encouraging HNI Clients to enhance business within their network
* Identifying & developing team of HNI Clients, to motivate & train them for new financial products in market to increase market share for company.
* Team Management of HNI Clients.

**AXIS Bank Ltd Aug 2008 – Sep 2009**

**Relationship Manager – Priority Banking**

**Roles & Responsibilities:**

* Selling Insurance, Mutual Funds, General Insurance, Home Loan, Auto Loan, Personal Loan, ODAP, assets products as well as other financial products of the bank to the new & existing HNI (Priority) clients.
* Enhance the existing portfolio through new acquisition on liability products like Priority Savings Accounts & Fixed Deposits from HNI clients.
* Focus mainly on Third Party Products & Assets Products for achieving revenue targets.
* Developing new relationship for liabilities (Priority Saving Accounts) specifically and cross sale of all range of TPP products.
* To maintain & enhance saving balance of more than 300 Priority Saving A/c holders.

**Centurion Bank of Punjab (HDFC Bank Ltd)**, Ahm **Jan 2006 – July 2008**

**Customer Relationship Officer – Retail Banking**

**Roles & Responsibilities:**

* Selling Insurance, Mutual Funds, General Insurance, Home Loan, Auto Loan, Personal Loan, and ODAP, assets products as well as other financial products of the bank to the new & existing clients.
* Enhance the existing portfolio through new acquisition on liability products like current account, savings accounts, and fixed deposits; demat accounts & online trading account.
* Focus mainly on CASA, Third Party Products & Assets Products for achieving revenue targets.
* Developing new relationship for liabilities (CASA) specifically and cross sale of all range of TPP products.
* Meeting & Calling the customers on day to day basis to discuss & meet there investments need, updating on market, investment status & managing their portfolio.

**Maini Materials Movement Pvt. Ltd, Vadodara July 2000 - Dec 2005**

**Sales / Marketing Manager**

**Responsibilities:**

* Appointing, developing & handling new dealers / stockiest for company.
* Promoting & strategizing corporate business in Gujarat region through dealers & stockiest channel / network.
* Managing smooth functioning between branch, regional office & corporate office, maintaining & establishing relationship with dealers / stockiest, developing new customers & broadening existing customer base in Gujarat region.
* Successfully organized & managed 02 Exhibitions to increase market share for company.
* Generating daily, weekly, monthly & annual reports.
* Reporting to Regional Head at Mumbai & President at Maini - Bangalore.

**Present CTC: 12.00 Lac Fixed + Variables + Perks**

**Notice Period: 3 Months or Notice Buy**

**Date of Birth: 2nd January, 1980**

**Languages Proficiency: English, Hindi, Gujarati & Marathi**

**Computer Proficiency: MS Office, Customer Relationship Management**