**SGHILDIYAL77@GMAIL.COM CURRICULUM-VITAE**

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**CAREER OBJECTIVE**

I aspire to join an organization that inspires me with adequate challenges and opportunities to grow not only as a professional but also as a person while applying my knowledge, creativity and innovativeness.

**PROFESSIONAL EXPERIENCE**

KOTAK MAHINDRA BANK July 2014 To Till Date **Designation:** Relationship officer (Deputy Manager Branch Banking)

JOB PROFILE:

* Relationship Manager of Retail and HNI customer
* Acquisition of new customer
* Maintain the service quality
* Provide proper solution to the customer
* Cross selling of product like Life insurance, Mutual Fund, Loan and Finance etc.

ICICI Securities Limited Feb 2012 To 30 June 2014  **Designation:** KeyRelationship Manager

JOB PROFILE:

* Relationship Manager of Retail and HNI customers
* Cross selling of investment tools as PMS, Private Equity, Life Insurance, General Insurance

Structured Product, Home Loan, and Mutual Fund etc. to existing and new customers.

* Following the market and provide advising client appropriate on stock post market trends
* Understand the client’s financial position and need and advising on financial planning
* New client acquisitions and maintaining existing base
* Raising a customer SR and ensuring to close the SR in TAT
* Lead entry of financial products picked and reconciliation of revenue
* Ensuring all the client adhere KYC and compliance policies
* Providing training to newly appointed relationship manager
* Analyzing the financial capabilities of client and providing them appropriate investment solution ensuring that the solution provided carry the minimum investment risk.
* Handling the portfolio of the High Net Worth Clients and enhancing their overall relationship with the I-Direct, Including Bank Investment Advisory and Wealth Management

**ACHIVEMENTS**

* Complete the take off target given by the company
* Got confirmation certificate within 6 month
* Promoted as a Senior Relationship Manager after 6 month of confirmation and right now working as a Key Relationship manager
* Qualify for power meet at GOA
* Qualifying for shikher contest consecutive two year in Silver and Gold category
* Won price for Financial Planning Services at the month of August 2012
* Won many prices for Insurance and wealth products.
* Served as Investment Relationship Manager in the I-Direct branch and achieve the branch target through cross selling of Mutual Funds, Insurance, Bonds, PMS, Structure Products etc.

**TECHNICAL SKILLS:**

**Excel tools** : Use of excel tools : Functions, Graphs, Charts, Pivot Table and Arrays, etc

**Operating System**: Windows98/2000/XP/Windows 7 & 8

**Office Tools**  : MS-OFFICE, Word, Excel, Power Point

**EDUCATIONAL QUALIFICATIONS**

2010-2012 **MBA**(Marketing & IT) from Lloyd Institute of Management & Technology G.R Noida

2010 **Graduation** from OIMT Rishikesh (**BCA**)

2007 **Intermediate** from U.A Board

2005 **High School** from U.A Board

**PROFESSIONAL QUALIFICATIONS**

* IRDA Certified
* AMFI Certified

**OTHER ACTIVITIES & HOBBIES**

* Organizing various cultural programs & won prices
* Reading E-Books
* Net surfing
* Making new friends
* Doing Mimicry of Actors

**PERSONAL DETAILS**

NAME : Anurag Baluni DOB : 03-05-1989 Sex : Male Marital Status : Single Nationality : Indian Languages knows : English, Hindi

**Declaration**

I hereby declare that the above written particulars are true to the best of my knowledge and belief.

(Anurag Baluni)

Date:   
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Place: