|  |  |
| --- | --- |
| **ROSHNI UPADHYAY** | **Room: 455, G-Block, V.P. Nagar,**  **B/h Buddha Temple, Lala Lajpatrai Road,**  **Worli Mumbai, Maharashtra, India**  **Phone: 022-24912354 Mobile: 9768015051 Email: roshniupadhyay@yahoo.co.in** |

***Career Objective:***

I want to work hard to gain as much knowledge as I can get regarding my field and profession to gain expertise and contribute towards my company’s medium as well as long term growth and success.

***Professional and educational background:***

***Employment summary:***

|  |  |  |
| --- | --- | --- |
| ***Organisation*** | ***Period working*** | ***Roles / Responsibilities*** |
| **Indusind Bank Limited** | June 2014 to till date | **Role: Associate Manager-Remittances**   * Doing transfers,NEFT/ RTGS & Salary uploads, making DD/PO,s. * Making of new fixed deposits, renewal of fixed deposits. * Handling forex Inwards/Outward remittances. * CASA Account Closures. * Handling cash transactions (Branch -Teller). * Handling petty cash of the branch * Custodian for locker and branch. * Maintaining office accounts & registers. * Handling E- Tax payments. * Cross selling of multiple products of bank. |
| **Indusind Bank Limited** | April 2013 to May 2014 | **Role: Manager-Customer Service**   * Doing transfers,NEFT/ RTGS & Salary uploads, making DD/PO,s * Making of new fixed deposits, renewal of fixed deposits. * Doing forex Inwards/Outward remittances like rate booking,uploading,follow ups and escalations. * Taking all request of clients like statements,cheque book request, debit card, welcome kit.. * Taking care of IPO issues, Bonds & ASBA application. * Taking charge of safe locker(Issuance & Access). * Attending clients and directing them as per their requirements. * Take care of Issues and escalations * Timely reply to the clients for E-Statement or any balance related queries. * Cross selling of Savings account, current account, credit cards, mutual funds, Insurance and investments LAP/LAS, Home loan, Buissness loan & all banking products. |
| **HDFC Securities Limited** | Jan-2012 to April 2013 | **Role:** **Relationship Manager(Equities & Investments)**   * Executing and punching orders for HNI, Retail and NRI clients in equities and derivative segment. * Maintaining and tracking clients position. * Maintaining portfolio of clients & timely executing the orders accurately as per the clients. * Circulating all research calls of HSL’s Analyst to clients on time. * Keeping track of risk of client (mark to market position even holding & margin limits of clients). * Visiting clients to Build good relationship for our business. * Cross selling of other products of banks like DIYSIP for Equities and Gold ETF, Insurance products, Fixed deposits, NCD,IPO, Govt Bonds,IHO (Indian Health organization health card). * Taking care of clients DMAT & Trading a/c ‘s all queries are resolved on phone and on same day if received via E-mail. |
| Angel Broking Limited | May 2010 to Nov2011 | **Role: Training & Evaluation Executive (For Call & Trade and Process Training Team- CSO**   * Initiated the new process for Training Online Angel Broking Clients on E-broking products. * Arranging & Training Call and Trade Team Clients online on E-broking Trading Products (Angel Diet, Trade, Mobile Trading and Client BackOffice etc). * Conducting Special Face to Face Online Training Seminars on every Saturdays for C&T Clients. * Conducting Classroom Training for Angel Sales Team,Branch Managers on different Angel Product i.e. Advisory dashboard Lead Management Application, M-Connect, E-broking Product etc. * Training on Trading Application i.e. Angel Diet, Angel Trade and Angel Investors to Sales team and Dealers. * All queries are resolved on time over the phone and on the same day if received via email. * Training on CRM Application and Wealth Management Application (e-chopda) to our Branch Managers and Co-ordinater,Maintaining the Monthly Client Training MIS reports, Preparing Process Flow charts and E-broking Training Clients and Employee Feedback Form. * Training the ING Vysya Bank Clients,Monitoring andevaluating the dealer activities & providing the feedback to the dealers on their dealing activities. Solve the queries and provide updates in case of any changes.. |
| Disha Enterprises | June 09 to Mar 2010 | Maintaining account & Bills, Data Entry, Sending Mails to Clients, Taking Purchase Orders, Handling Clients, and Handling other daily office related Work. |

***Additional Qualification /Achievements :***

|  |  |  |
| --- | --- | --- |
| ***Course / Qualification*** | ***Year of passing*** | ***Grade*** |
| NCFM (Dealer Module) | 2009 | II Class |
| NCFM (Derivative Module) | 2012 | I Class |
| NISM (AMFI Certification) | 2013 | I Class |
| INDUS PRO Certification | 2013 | I Class |

***Details of Professional / Educational qualification:***

|  |  |  |  |
| --- | --- | --- | --- |
| ***Course / Qualification*** | ***Year of passing*** | ***Board / Institute*** | ***Grade*** |
| Masters of Business Administration | Pursuing | ITM Institute | \_ |
| B. COM. | 2009 | Mumbai University | II Class |
| H.S.C. | 2006 | Maharashtra Board | II Class |
| S.S.C. | 2004 | Maharashtra Board | II Class |

***Personal details:***

**Date of Birth :** 05-06-1989

**Nationality :** Indian

**Marital status :** Single

**Hobbies** : Listening Music, Watching Cricket.

Name: Roshni D. Upadhyay

Place: Mumbai

Date: