**Harshal Vijay Surve**

F9/9, New Deonar Municipal Colony,

Govandi (E),

Mumbai- 400043

Maharashtra, INDIA.

Contact No. **9870756944 / 9029672880**

E-mail: **harshal.surve@rocketmail.com**

Highly competent Professional offering an experience of over 4 year in the Banking and Insurance sectors. Excellent communication skills summed up with splendid knowledge in the areas of **Liabilities, Assets, Portfolio Management, and Client Relationship Management, Investment Analysis, phone banking and Financial Management.**

Innovative and exceptionally creative to foster ideas that impel the organization towards a result-oriented direction. Impeccable client management and leadership skills with impressive professional-speaking abilities.

With a brilliant professional record I aspire to join as Junior & Middle Level Managerial Position where in my diligence and exceptional domain knowledge contribute to the growth of the organization.

**ACADEMIC**

|  |  |  |
| --- | --- | --- |
| **EDUCATION** | **YEAR OF PASSING** | **UNIVERSITY/BOARD** |
| B.COM | 2011 | Mumbai University |
| H.S.C | 2008 | Maharashtra State Board |
| S.S.C. | 2006 | Maharashtra State Board |

**CERTIFICATION**

* AMFI Certified
* IRDA Certified

**KEY SKILLS:**

Insurance, Finance, Investment, portfolio, sales,

**ORGANIZATIONAL EXPERIENCE**

**11th Aug 2014 to 31st Jan 2015 : Standard Chartered Finance LTD.**

**1st Feb 2015 to Till Date : Standard Chartered Bank**

**(Assistant Manager)**

The job role included-

* Acquire/Develop new and expands existing High Net worth Customer relationships for liabilities,
* Cross-selling of Products like CASA, insurance, MF, Assets
* Profiling Customers and provide Wealth Management & Financial Planning Products to meet customer needs.
* Maintaining relationships with a select group of high net worth customers through individualized customer service.
* Ensures high levels of customer service orientation and application of Company policy.
* Deepen the relationship by Cross selling existing Company products to customers.
* Informs customers of new products or product enhancements to further expand the relationship.
* Maintains complete relationship record for assigned customer accounts.
* Tracks customer complaints/queries and turnaround times for customer satisfaction.
* Up selling and cross selling to clients
* Generating demand by meeting and convincing the potential clients by regular visit.
* Co-ordination in planning, formulation, and implementation of marketing strategies for sales growth
* Analysis of Financial Health review and identifying and supporting long term financial goals of clients.
* Achieving business targets assigned in terms of numbers and value.

**8th Aug 2011- 07th Aug 2014 Worked with I Process Services (India) Pvt. Ltd**

**(Senior Sales Executive)**

The job role included-

* Acquire/Develop new and expands existing High Net worth Customer relationships for liabilities,
* Cross-selling of Products like Home Loans, CASA, Mortgages.
* Opened 5, 6 CASA accounts on monthly basis.
* Selling 2, 3 Home loans on monthly basis and 1, 2 Mortgages.

**PERSONAL PROFILE:**

Father’s Name: Mr. Vijay Surve

Mother’s Name: Mrs. Rekha Surve

Date of Birth: 27th Mar 1990

Gender: Male

Marital Status: Unmarried

Nationality: Indian

Languages Known: English, Hindi

Permanent Address: F9/9, New Deonar Municipal Colony, Govandi (E), Mumbai- 400043

Maharashtra, INDIA.

**DECLARATION:**

**I hereby declare that all the details furnished above are true to the best of my knowledge.**

Place:Mumbai ***Harshal Vijay Surve***

Date: 1st July 2015