

MANSI P. LAKHTARIA

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EDUCATIONAL PROFILE

Level	Board	Institute	Result	Year
PGDM (Finance)	G.U.	B. K. School of Professional and Management Studies, Ahmedabad	3.92 GPA	2020
M.Com	G.U.	H A College of Commerce, Ahmedabad	64%	2018
B.Com	G.U.	H A College of Commerce, Ahmedabad	69.9%	2016
H.S.C.	G.S.H.S.E.B.	Kanya Vidhyalay, Ahmedabad	74.16%	2013
S.S.C.	G.S.H.S.E.B.	Nutan High School, Ahmedabad	78.8%	2011

WORK EXPERIENCE

1. Working as **Demat Executive** at **Shah Investor's Home Limited** since **December 2017**.

- Responsibilities:
 1. Reconciliation of clients' AMC revenues
 2. Collection and Analysis data for NSLD and Internal Audits with Compliance Department
 3. Handling of client KYC process and related tasks
 4. Handling clients in-person as well as over Phone and Email
 5. Acquisition of inactive clients by contacting them and explaining facilities provided by the company
 6. Gaining knowledge of physical share dematerialization process
 7. Verification of account closure request with the share transfer process, transmission process as well as final payment of closing Demat deposits.
 8. Collect, enter and verify Delivery instruction slip of client for off-market transaction
 9. Manage Cash and other bank data of all branch related to the Demat department
 10. Team member in process of Buyback shares of Shah Investor's Home Limited

TECHNICAL SKILLS

Working knowledge of **Microsoft Office, CRM and Internet**

CERTIFICATION

NISM-series 6: Depository Operations by National Institute of Securities Market

EXTRA CURRICULAR ACTIVITIES

Represented the college in various dance competitions

HOBBIES

Paper Art & Craft, Travelling