



PROFILE

To work in a challenging and creative environment contributing to the growth and development of the organization and in the process to attain knowledge and work satisfaction by achieving organization and personal goal.

CONTACT

PHONE:
8878239696

EMAIL:
Guptagaurav.1444@gmail.com

ADDRESS
L-5 Lake view apartment Vastrapur,
Ahmedabad 380015

SKILLS

- Negotiation skill
- Client engagement
- Portfolio Management
- Financial Advisory
- Marketing
- Investment planning
- Customer service
- MS Office (Excel, Word Powerpoint)

AWARDS

- Award of Excellence- Exemplary performance in March ZCDP Contest 2022.
- Award of Excellence- Exemplary performance in Feb RCDP Contest 2022.
- Rookie RM Rank 1 (SIP) in

GAURAV GUPTA

EDUCATION

Pune University, Pune
MASTERS OF BUSINESS ADMINISTRATION (2019-2021)
(Finance & Marketing) – 76.38%

Jiwaji University, Gwalior
B.COM (2010-2013)- 57%

Makhanlal Chaturvedi Rashtriya patrakarita vishwavidyalaya
PG DIPLOMA COMPUTERS (2015-2016)

Kendriya Vidyalaya Karera
12th (2008-2009) – 54.8%

Kendriya Vidyalaya Karera
10th (2006-2007) – 62%

WORK EXPERIENCE

[ICICI SECURITIES] [KEY RELATIONSHIP MANAGER]

[July 2021]– [April 2023]

- Involved in Relationship building & Management with the customer for sales and services of Financial Products of ICICI Group.
- Managed customers in the branch or through client visits and provided Financial/Investment Advisory.
- Work quickly to address and resolve customer issues and queries.
- Encourage high sales and good customer service practices.
- Developed new relations through referencing and other sources. Generated leads and ensured the fulfillment of budgetary expectations of the organization
- Handled existing client portfolio and worked on monthly new client acquisitions and on achieving monthly targets of the financial products resulting in

Gujrat Region.

- Rank 3 in Investment Champ contest of Jan 2022.

CERTIFICATIONS

- NISM SERIES 5TH –Mutual Fund Foundation.
- NISM SERIES 6TH-Security Operations and Risk Management.
- NISM SERIES 8TH-Equity Derivatives.

IRDA CERTIFICATIONS

- IC38 - SERIES 8TH-Certificate Exam for Corporate Agent.

highest revenue.

[MANIPAL CIGNA] [TRAINEE ASSOCIATE]

Duration 3 Months

- Ensured sales of Health Insurance Policies through leads, cold calling and references.
 - Follow up with clients regarding any queries and assisted in awareness of health insurance and with this ensured sales closure.
-