

## **SHEETAL ARVIND KOTHARI**

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Permanent Residence : Ahmedabad (Gujarat)



### **PROFILE SUMMARY:**

- Ambitious and dynamic professional with hands on leader with experience in Finance and Insurance.
- Talented at educating customers on Investments, Insurance products and recommending the best options to meet long- and short term needs.
- I credit my success so far to my effective interpersonal skills combined with articulate and professional communication skills.

### **OBJECTIVE:**

To seek challenging and growth oriented opportunities in the area of Finance and Insurance wherein I can utilize my skills and strategic thinking towards achieving Corporate Goal.

### **PROFESSIONAL EXPERIENCE:**

**COMPANY : SELF-EMPLOYED WITH MR. ARVIND KOTHARI (FAMILY OWNED BUSINESS) - MUMBAI**

**DURATION : 01<sup>ST</sup> JUNE 2001 - 31<sup>ST</sup> MARCH 2013**

**JOB ROLE : INVESTMENT & FINANCIAL ADVISOR**

#### **Job Responsibilities:**

- Assisting HNI & legacy clients in their decision-making on Investment in Mutual Funds, Fixed Deposits schemes, General Insurance, Life Insurance & all other investment products.
- Maintaining the portfolio of the customer related to tax saving Investments.
- Filing of IT returns for salaries Individuals.
- Process of New Pan Card and correction in Pan card for my clients.
- Updating records and keeping a track of the business outflow and inflow.
- Providing with aftersales and assistance whenever required by clients.

**COMPANY : PEARL SHELTERS PVT LTD - AHMEDABAD**

**DURATION : 16<sup>TH</sup> JANUARY 2016 - 22<sup>ND</sup> AUGUST 2016**

**JOB ROLE : OFFICE ASSISTANT CUM RECEPTIONIST**

#### **Job Responsibilities:**

- Handling day-to-day activities, including mails, telephone, cash, ledgers, cold callings etc.

- Daily updates and follow-ups of the office.
- Coordination with the office staff with various aspects of the organization.
- Software management of 13 schools run by the organization.
- Guide students for abroad studies and help them with selecting the courses and exam modules and
- Enroll them for the IELTS, TOEFL, GMAT, GRE, SAT etc...

**COMPANY : AFFINITY ASSOCIATES LIMITED (KPO) UK PROCESS – AHMEDABAD**

**DURATION : 1<sup>ST</sup> NOVEMBER 2016 TO 20<sup>TH</sup> JUNE 2019.**

**JOB ROLE : ADMIN & ASSISTANT TO HR**

**Job Responsibilities:**

- Handling day-to-day activities, including mails, telephone, ledgers etc.
- Statutory work for filing of confirmation statements for 250 + UK based clients.
- Daily updates and follow-ups of the office.
- Conducting telephonic interviews and entrance tests for the organisation.

**COMPANY : PRUDENT INSURANCE BROKERS PVT LTD – AHMEDABAD**

**DURATION : 21<sup>ST</sup> JUNE 2019 – 30<sup>TH</sup> APRIL 2020**

**JOB ROLE : ASSISTANT MANAGER IN GOVT & RURAL VERTICAL DEPT**

**Job Responsibilities:**

- Handling day-to-day insurance activities, including mails, telephone, ledgers etc.
- Providing general insurance services to large groups like JPA Group PA & Group Mediclaim policies, Fire, Theft, Bankers Indemnity, Cattle insurance etc.
- Preparing RFQ's and requesting competitive rates from various Insurance companies to benefit the Group.
- Customer Support & Assistance to corporate sales.

**COMPANY : INTEGRATED RISK INSURANCE BROKERS LTD. - AHMEDABAD**

**DURATION : 1<sup>ST</sup> MAY2020 – 31<sup>ST</sup> DECEMBER 2020**

**JOB ROLE : OPERATIONS MANAGER (BRANCH HEAD)**

**Job Responsibilities:**

- Handling Corporate & Retail Insurance business of Life & Health Products.
- It involved meeting & interacting with retail customers, assess their credit worthiness, identifying their specific needs and suggesting optimal solutions.

- Generated repeat business through exceptional customer service and responded to customer concerns with friendly and knowledgeable service.
- Appointing of POSP's and training them.
- Trained 6 Interns from Bimtech how to process cold calling and generate good leads by convincing the clients with buying best products according to their needs.

### SKILLS AND ABILITIES:

- An optimistic and confident individual with an ability to facilitate changes.
- Comprehensive problem solving & good interactive abilities to convince the clients and lead a team.
- Adherence to high customer service standards.
- Harbinger of Innovations with leadership skills.
- Passionate, enthusiastic and ethical at work.
- Excellent quantitative, analytical and communication skills.
- Having good understanding and knowledge about Insurance.

### EDUCATIONAL DETAILS:

EXAM / DEGREE	YEAR	NAME OF INSTITUTE	UNIVERSITY/ BOARD
T.Y.B.Com.	2000-2001	Dalmia College Of Commerce, Malad, Mumbai	Mumbai University
12 <sup>th</sup> Board	1997-1998	Dalmia College Of Commerce, Malad, Mumbai	Maharashtra Board
10 <sup>th</sup> Board	1995-1996	Our Lady of Remedy high School Kandivali, Mumbai	Maharashtra Board

**Ms. Sheetal Arvind Kothari**

**Date:-**

**Place:- Ahmedabad**