

Priya Shanmugam V

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PROFILE STATEMENT

Adaptable and responsible graduate seeking opportunities in finance sector, where my training in financial operation and heart for customer service can be utilize. With excellent academic record and capable of working under pressure. Masters in finance study gave me logical mind. Eagerly looking forward to learn and grow in finance sector.

WORK EXPERIENCE

- **HDFC Bank Ltd. As an Assistant Manager in Virtual Relationship Management Department from 19th Dec 2017 till 17th Oct 2019**

Task performed:

- Manage 1350 Nos. of HNW client portfolio digitally in digital banking department.
 - Meet customer engagement plans and provide services regarding to each and every financial product (Life Insurance and General Insurance, Liability, Asset, Credit Cards, Demate) and also handling all client's complaints including digital banking related complaints along with coordinated with all concerned departments and resolved all queries within turnaround time.
 - Identified new business opportunities through existing relationships by up-selling and cross selling of each and every financial product (Life Insurance and General Insurance, Liability, Asset, Credit Cards, Demate)
 - Manage some team reports and monitoring team member's compliance and reported to Team Manager.
- **KOTAK MAHINDRA BANK. As an Deputy Manager in Branch banking from 02nd Nov 2019 till 17th October 2020.**

Task Performed :

- Managed 850 Nos. of Privy Prima Customers.
- Regular Customer meetings and callings to be done and provide the services regarding every banking products.
- To ensure customer relationship building and cross selling of our banking products (Liability, SIP, Health Insurance ,General Insurance, Credit Card , Asset, Demat)
- To Grow the Book size and Book Value Of CASA.

EDUCATIONAL QUALIFICATIONS

Qualification	Institution	University/Board	Year	%
MBA in Finance	Gandhinagar Institute of Technology	Gujarat Technological University	2017	85.7%
Bachelor of Commerce	Shri K. K. Shastri Government Commerce College	Gujarat University	2015	60.50%
Class - XII	Nelson's Higher Sec. School	Gujarat Board	2012	77%
Class - X	Trinity Higher Sec. School	Gujarat Board	2010	79%

TRAINING & CERTIFICATIONS

Summer Internship Project (SIP)

- Company Name: SMC Global Securities Pvt Ltd.
- Project Title: Risk Management In Forex Market
- Project Description: Overview of market, Risk management involved in Forex market, Importance of Heading.
- Duration: 8 Weeks

Comprehensive Project (CP)

- Project Title : Analysis of Linkages between different Economic Indicators and Financial Market
- Duration: 1 Year

Global Country Study Report (GCSR)

- Company Name: Arvind Textile Industry (2 weeks)
- Project Title : Global Country Study Report on Textile Industry
- Status: A group of 5 members are allotted to do the report on GCSR
- Country: UK
- Duration: 1 Year.

EXPERIENCE & ACHIEVEMENTS

- I had Worked at HDFC Bank as Virtual Relationship Manager.
- I have achieved certificate of Coordinator of Techfest from GIT.
- I have achieved certificate of Head of MBA Department of Techfest from GIT.
- Certificate of Business in the Digital Era of Gujarat technological university
- General Insurance moment toward Hunger achievement award.

Training and Certifications

- NISM Series V – A : MutualFund Distribution Certification.
- IRDA (IC – 33) Insurance Agents Certification

COMPUTER SKILLS

- MS Office
- TallyERP9
- Gretel
- Financial Analysis

PERSONAL INFORMATION

Permanent Address : 112/874 Gujarat Housing Board, Khokhara,
Maninagar(E),Ahmedabad– 380026

Date of Birth : 07th September 1994

Gender : Female

Language Skills : English, Gujarati, Hindi & Tamil