

# NARENDRA CHAWLA

## SKILLS

- Banking and Financial Services ·
- Reconciliation & Trade Operations ·
- Investment Banking ·
- Wealth Management ·
- Portfolio Management ·
- Operations Management

## LANGUAGES

- English
- Hindi
- Punjabi
- Sindhi
- Haryanvi

## ACHIEVEMENTS

- Lean certified:  
Generated ideas for the process improvement which is approved by the client and is also implemented by the onshore team as it saves 0.5 FTE in production unit.

## AWARDS

- Browns Award
- Best Performance Award
- Best of the Best Award
- Awarded with Fun Catalyst, zero defect and Spotlight awards.

## SENIOR DOMAIN EXPERT

E 9392925791 □ Nikhilchawla537@gmail.com

## SUMMARY

A dynamic professional with more than 9 Years of experience in Banking and Financial Services

## EXPERIENCE

### Senior Domain Expert

2018-2024

#### Incedo Inc.

Joined in Wealth Management team started as Senior Associate for a leading U.S. Wealth Management company.

- Dealing with high-net-worth clients such as Clark, Rockdale, Fidelity, and TD Ameritrade for their managed investments.
- Mentoring and providing leadership to junior members of the team. Identify areas for improvement and provide guidance on how to enhance skills and knowledge. Managing the money movement in the client's account through various money in and money out channels such as contribution by check, automated clearing house, automatic investment plans, withdrawals, etc.
- Responsible for providing strategic direction to the organization. They use their knowledge and expertise to advise on key decisions, such as product development, market strategy, and business expansion.
- Identifying potential risks and providing recommendations on how to mitigate them. This can include identifying potential issues with product development or identifying potential regulatory or compliance risks.

### Senior Media Planner

2018

#### ARM Worldwide

- Responsible for developing media strategies that align with the client's advertising goals. Analyzing data, conducting research, and creating insights that drive the media plan.
- Works closely with clients to understand their business needs, develop media plans that meet their goals, and provide regular updates on campaign performance. Manages the client's media budget, ensuring that it is allocated effectively across different channels and tactics to maximize ROI.
- Building relationships with media partners, negotiating rates, and securing optimal placements for their clients' campaigns.
- Conducts research on market trends, consumer behavior, and competitive analysis to inform media planning decisions. Monitoring and analyzing campaign performance, making recommendations for optimization, and providing regular reports to clients.

### BPO Executive Level II

2016-2018

#### NTT Data Global

- Providing leadership and guidance to junior staff members. Also involves mentoring and training, delegating tasks, and ensuring that projects are completed successfully
- Ensured all files were complete prior to underwriting hand-off and coordinated effectively with title companies to ensure smooth closings
- Managing relationships with clients, ensuring that their needs are met, and addressing any concerns or issues that arise.
- Responsible for ensuring that the work produced by their team meets high standards of quality and accuracy.
- Also involved in reviewing and editing work, providing feedback, and implementing quality control processes.

## EXPERIENCE

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### Process Associate

2014-2016

#### Genpact India Pvt. Ltd

- Worked for BT Financial Group, managed investments, superannuation, and retirement products and Wrap platforms
- The process includes day to day requests for funding the client's investments into various Superannuation Products Like PSP, APP, GIP
- Meeting daily SLAs with 100% accuracy
- Maintaining workflow and daily basis reports like: SLA, TAT, TOS and Login reports.

## EDUCATION

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### MBA (Operations)

2017 - 2019

Symbiosis International University

### Bachelor of commerce

2010 - 2013

Lucknow University

## Personal Details

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Date of Birth: 08th November 1992

Gender: Male

Nationality: Indian

Marital Status: Married

Permanent Address: Central Excise colony, Street Number 9,  
Bagh Amberpet, Near Ayyapa swami  
temple, Hyd - 500013

## OTHER IT SKILLS:

- Well versed with Microsoft Office Suite
- Word, Excel & PowerPoint
- Microsoft Outlook & Internet Applications.
- Familiar with Citrix, Thomson 1, BETA and BTEP

## CERTIFICATION

- Lean tested and certified
- DOAP in computer applications.