

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.

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.

EXPERIENCE

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

MBA (Operations)

2017 - 2019

Symbiosis International University

Bachelor of commerce

2010 - 2013

Lucknow University

Personal Details

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