

SUDHIR BHARGAVA

Sales Account Executive, Fintech/Payments

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WORK EXPERIENCE

Sales Account Executive, Fintech/Payments

Xplor Technologies

📅 08/2023 - current 📍 New York, NY

- Business development to build and manage my client portfolio. working with businesses to provide savvy fintech, payment and cash flow solutions, achieving top 25% results
- Initiated and sustained productive referral networks with small banks and CPA firms, leading to a 40% increase in client base.
- Maintain strong relationships and partnerships with associated business departments and fintech partners for consistent, timely and effective customer results and solutions, and 100% customer satisfaction.

Founder/Finance Consultant/Crypto Listing Partner

Metafin.biz

📅 11/2018 - 07/2023 📍 New York, NY

- Launched metafin.biz, growing from freelancing with Upwork to a specialized finance consultant for startups, banks, crypto exchanges and crypto businesses, engaging over 30 clients in blockchain and banking sectors.
- Forged strategic partnerships with top exchanges like Bdex and Latoken, enhancing market presence and user base for clients, mostly in the IEO space
- Undertook a contract with NYC Business Solutions that achieved over \$12 million in loan funding for startups and existing businesses in partnership with credit unions & community banks. Top performer accolade received.

VP, CCB Business Relationship Manager III

JP Morgan Chase & Co

📅 04/2016 - 08/2018 📍 New York, NY

- Managed and grew to 190%, a portfolio of business clients for their lending and banking needs - sales, underwriting, KYC and service for Equipment Finance, Receivables Finance, Commercial Mortgages, SBA loans, Lines of Credit, Trade Finance, Commercial Card, Term Loans, FX Lines, FX payments and Cash Management

CAREER OBJECTIVE

A driven, collaborative and customer focused Fintech Sales Executive with a depth of banking/lending experience combined with a zest for technology in business. Passionate about the startup sector as an innovation driver and fintech/web3 as a way of improving financial access and inclusion. Possess a strong track record of sales success from effective partnerships, a goal focused approach and strong analytical skills. Have strong global work exposure and perspective.

EDUCATION

Master of Applied Finance
Finance

[University of Melbourne, Australia](#)

📅 07/2003 - 06/2019

Graduate Certificate
Web and App Development

[Harvard University Extension School](#)

📅 01/2018 - 06/2019

Certificate
Commercial Lending
[Moody's Analytics, New York](#)

📅 01/2013 - current

Professional Certificate
Blockchain Fundamentals
[University of California, Berkeley](#)

📅 11/2020 - current

- Partnered with internal specialists and external stakeholders to exceed sales targets, achieving 147% of lending target as of December 2016
- Ensured strong client retention and satisfaction rates and excellent sales, lending and profit growth for my portfolio, including the largest commercial mortgage in my team (\$6 million), yielding 190% portfolio growth in 2017
- Led a team of 5 junior Relationship Managers, increasing client retention by 25% through targeted coaching strategies.

VP, Senior Business Relationship Manager

HSBC USA

📅 04/2012 - 07/2015 📍 New York, NY

- Maintained proactive and effective interaction with Enterprise clients to understand financial needs and operations of their businesses and ensure strong banking partnerships, with award winning new revenue of \$272,000 earned in 2014, and 140% portfolio growth in 2015
- Developed strong client and stakeholder relationships resulting in high client retention and strong sales growth, Achieved top performer award in 2014, and top deposits award in 2015
- Maintained active sales pipeline to achieve and exceed sales goals
- Identified opportunities to improve business process flows and productivity.

Business Banking Manager

National Australia Bank

📅 01/2009 - 12/2011 📍 Sydney, Australia

- Worked with Australia's largest Business Bank on a portfolio of businesses to partner with them for their banking and lending needs. Achieved customer satisfaction scores in excess of 85% year on year
- Supervised assistants to ensure optimum service and sales results
- Exceeded sales/revenue goals through combination of business development and retention. Awarded highest new to bank lending award in 2011

Business Banking Credit Analyst

National Australia Bank

📅 01/2004 - 12/2008 📍 Sydney, Australia

- Managed credit process for commercial lending applications in assigned portfolio of businesses
- Monitored credit quality of assigned book including managing loan renewal process
- Worked well in team setting, providing support and guidance
- Used strong analytical and problem-solving skills to achieve

Certificate

Fintech: Foundations & Applications

Wharton School, University of Penn

📅 06/2021 - current

Certified Professional for usability and User Experience (CPUX-F)

User Experience Design

UXQB (International Usability & UX Qualification Board)

📅 06/2019 - current

📍 Koln, Germany

SKILLS

- Business Development
- Partnership Management
- CRM Tracking & Management
- Client Relationships
- Consultative Selling
- Referrals and Networking
- Business Finance, Payments & Ecommerce
- Banking, Lending, Trade Finance & FX
- Crypto currency & trading, IEO listing
- Web/App Development & UX Design