

Aishwarya Katar

512-698-1352 | aishwaryarozekar@gmail.com | www.linkedin.com/in/aishwaryakatare | Tualatin, OR 97062

EXPERIENCE

Associate Personal Banker <i>WELLS FARGO</i>	Nov 2023 – Apr 2024 <i>Austin, TX, USA</i>
<ul style="list-style-type: none">Facilitated banking transactions, including account opening, personal loans, and credit card services, with a focus on customer satisfaction and financial responsibility.Provided exceptional customer service by efficiently handling account service requests, enhancing customer experience and retention.Developed strong analytical skills by assessing clients' financial situations and providing appropriate banking solutions.Conducted risk assessments and compliance checks to ensure adherence to banking regulations and policies.	
Relationship Manager - Banking and National Distribution <i>UTI MUTUAL FUND</i>	Oct 2020 – Jan 2022 <i>Pune, Maharashtra, India</i>
<ul style="list-style-type: none">Generated \$10M total lumpsum allocation for UTI Small Cap Fund (NFO) through the Mutual Fund Distributor (MFD) retail channel, contributing 20% to sales target.Activated noncontributing MFDs with substantial AUM, increasing engagement and sales by 20%.Secured tie-ups for UTI Equity Fund and other schemes, ensuring their inclusion in the product approved list for banks and National Distributors (NDs).Achieved \$16M in lump-sum investments for UTI Focused Equity Fund (NFO) through strategic presentations and motivation of banks and NDs.Activated the Bank of Baroda Radiance Channel, generating \$25M in sales within one month.Provided comprehensive training to interns and new joiners, enhancing their skills and establishing effective relationships with assigned counters.	
Marketing and Sales Intern <i>GODREJ PROPERTIES</i>	June 2019 – July 2019 <i>Pune, Maharashtra, India</i>
<ul style="list-style-type: none">Represented Godrej Properties' Emerald Thane project to Godrej employees at a special discounted rate, resulting in the sale of three apartments valued at \$50M.Engaged in direct sales through cold calling and walk-ins, as well as channel partner sales.Conducted price negotiations and provided expert guidance on suitable floorplans through thorough client needs analysis.Established strategic tie-ups with channel partners, leading to sales totaling \$60M.	

SKILLS

Deal negotiation, Relationship management,
Equity and Debt Capital Markets, Risk Management, Client Management,
Strong Analytical Skills, Excellent Communication Skills, Detail-oriented and Organizational Skills

LICENSES AND CERTIFICATION

- Texas Life and Health Agent (Valid 2023 - 2025)
- NCFM: Investment Analysis and Portfolio Management Module (Oct. 2019 - Oct. 2024)
- NCFM: Technical Analysis Module (Sept. 2019 - Sept. 2024)

EDUCATION

AMITY UNIVERSITY <i>Master of Business Administration, International Business</i>	Navi-Mumbai, Maharashtra, India <i>Aug. 2018 – June 2020</i>
Bharati Vidyapeeth University <i>Bachelor of Technology, Electronics Engineering</i>	Pune, Maharashtra, India <i>Aug. 2012 – June 2016</i>