

Aishwarya Katare

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EXPERIENCE

Associate Personal Banker

Nov 2023 – Apr 2024

WELLS FARGO

Austin, TX, USA

- 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

Oct 2020 – Jan 2022

UTI MUTUAL FUND

Pune, Maharashtra, India

- 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

June 2019 – July 2019

GODREJ PROPERTIES

Pune, Maharashtra, India

- 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

Master of Business Administration, International Business

Navi-Mumbai, Maharashtra, India

Aug. 2018 – June 2020

Bharati Vidyapeeth University

Bachelor of Technology, Electronics Engineering

Pune, Maharashtra, India

Aug. 2012 – June 2016