

Professional Summary

Managerial professional with working knowledge of financial best practices in business development.

Background in influencing executive-level decision-making and strengthening existing strategies. Defines and enforces impactful procedures for improved planning.

Experience

ICICI BANK LTD

November 2022 to Current

WEALTH RELATIONSHIP MANAGER

MOHALI, INDIA

- Generate revenue through wealth customers
- Cross selling of new products and services for both new and existing customers
- Achieve sales target for CASA and other products
- Maintain good relationship with customers, Cross sell of structure products, mutual funds and insurance

BANK OF BARODA

May 2022 to November 2022

SENIOR RELATIONSHIP MANAGER

- Maintaining portfolio of Baroda Radiance Clients both servicing and sales
- Taking care of wealth needs
- Cross sell of structure products, mutual funds and insurance
- Acquisition of New Radiance clients

AXIS BANK

June 2018 to March 2022

RELATIONSHIP MANAGER

- Maintaining and servicing portfolio of wealth clients
- Enhancement in the existing portfolio base « Revenue generation by cross selling fee products
- Minimizing customer escalations by providing appropriate solution - Resolution to customer's different financial needs
- Used creativity, strategic thinking and knowledge of current market trends to target and build relationships with potential customers
- Scheduled, arranged and attended meetings with customers to maintain trusting and long-lasting relationships
- Addressed and resolved customer complaints in efficient, effective and timely manner.

KOTAK MAHINDRA BANK

April 2017 to June 2018

RELATIONSHIP MANAGER

- Cross sell and Servicing to high end Salary Customers from mapped base
- Conducted clerical tasks, including data entry, preparing invoices, sending bill reminders and filing paperwork
- Prepared a range of documents on Sage Accounts, including bills receivable, invoices and bank deposits
- Kept updated with the latest financial laws by conducting regular development training and research
- Ensured timely payments by sending reminders to clients before payment was due
- Kept payment databases accurate and up to date by promptly documenting payments when received, completing for organisation purposes
- Conducted in-depth assessments and credit checks into customer accounts to review payment terms

- Processed client payments following company regulations, financial policies and procedures
- Administered strict guidelines for conducting internal audits to prevent external findings
- Maintained and updated accounting ledgers and journals to balance statements and maintain accurate records.

ICICI BANK

March 2015 to March 2017

Privilege Banker

Chandigarh

- Maintain good relationship with customers Cross sell of structure products, mutual funds and insurance
- Investigated old records to detect duplicate statements and fraud, avoiding penalties for non-compliance.
- Contributed to producing and interpreting improved finance related methods to establish consistency with accounts payable prerequisites
- Practiced accounting policies, rules and regulations to comply with applicable standards
- Evaluated financial records to detect errors and discrepancies and manage financial health of company
- Reconciled bank accounts to verify accuracy of cash records
- Facilitated mergers and acquisitions by generating necessary capital.

Core Qualifications

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|---|---------------------------------|
| · CASA ,LI, FD, Mutual Funds | · Invoice processing |
| · Customer query handling | · Collection regulations |
| · Asset servicing | · Bank deposit handling |
| · Managing NRI customers | · Account discrepancy resolving |
| · Portfolio management of HNI customers | · Fair credit practices |
| · IRDA | · Business administration |
| · AMFI | · Long-term business planning |
| · Dispute resolution | · Salesforce CRM |
| · Continuous Professional Development (CPD) | · Month-end close management |
| · Customer relations | · Expense management |
| · Faster Payments | · Invoice management |
| · Correspondent banking | · Financial KPI measuring |
| · Billing issue resolving | |

Education

Manipal University	2015
Diploma of Post graduation: banking and finance	
Bengaluru, KA	
D.AV PG COLLEGE	2012
B.COM	
Dehradun, UT	
SHALINI SCHOOL	2009
12th: COMMERCE	
Dehradun, UT	
S.G.R.R PUBLIC SCHOOL,	2007
10th	
Dehradun, UT	

Languages

- Can read, write and speak English and Hindi.