

SREETAMA HALDER

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Highlights

- Branch Banking
- Team Management
- Excels at up selling
- Portfolio Management
- Customer Handling
- ERP Work
- Ms Office

Extra-Curricular Activities

-Was selected as the MC (Master Compere) in MGIS, an event organized by BIBS

-Represented my club as the president of the NGO club

-Successfully held an event with autistic children as a part of NGO activity

-Actively took part in E-filing of Returns held at ICA

-Actively took part in seminar on GST

-Actively took part in "Speak Out or Bold Out" held at ICA

Work Experience

Service Officer July 2019 - January 2022

Kotak Mahindra Bank Ltd , Liluah

- Carrying out financial transactions of RTGS, NEFT and FUND TRANSFER
- Acts as the service officer at the front desk addressing customer grievances and resolving issues, responsible for receiving the instructions which includes mobile number update, name update, address change PAN update etc.
- Maintaining seamless service in the branch for HNI customers
- Responsible for timely commencement of the branch
- Handling cash in the teller
- Maintain records for clearing cheques and cheque returns from the clearing house and maintain track of the cheques for clearing
- Maintaining all the month end reports and verifications
- Responsible for carrying out weekly verifications and monthly reconciliation of the stationary
- Maintaining deliverables which includes cheque books, debit cards and welcome kits
- Acting as the custodian of keys of the branch
- Acting as the custodian of lockers at the branch, maintain their reports on monthly basis
- Responsible for allotment of lockers, surrender and break open process
- Looking after audit requirement of branch adhering to all the compliance requirement
- Achieving month on month target for cross sell including CASA, LI, GI, SIP and maintain self-standard of performance month on month basis

TELLER AND SA RELATIONSHIP OFFICER 01/2022 to Present

IDFC First Bank Ltd, Kolkata

- Handling cash, carrying out NEFT, RTGS, Fund Transfer, clearing
- Maintain the relationship with ETB customer and acquiring the NTB customer
- Maintain the relation values and promote month on month growth of the portfolio value
- Catering to the service request of the customer
- Acts as the service officer at the front desk addressing customer grievances and resolving issues, responsible for receiving the instructions which includes mobile number update, name update, address change PAN update etc.
- Maintaining seamless service in the branch for HNI customers
- Responsible for timely commencement of the branch
- Handling cash in the teller
- Maintain records for clearing cheques and cheque returns from the clearing house and maintain track of the cheques for clearing
- Maintaining all the month end reports and verifications
- Responsible for carrying out weekly verifications and monthly reconciliation of the stationary
- Maintaining deliverables which includes cheque books, debit cards and welcome kits
- Acting as the custodian of keys of the branch

Education :

MBA : Bengal Institute of Business

Studies Examination- MBA FINANCE
Institute - Bengal Institute of Business
Studies
Board/University - Vidyasagar University
Percentage - 76% %GPA - 8.13

PGPFM Bengal Institute of

Business Studies Examination-

Diploma Certification on Financial
Markets
Institute - Bengal Institute of Business
Studies
Board/University - BIBS + NSE
Percentage - 65%

Bcom (Hons) City College

Examination : B.Com (Honors)
Institute : City College Board/University :
Calcutta University Percentage : 43%

XII ISC Agrasain Balika Siksha

Sadan

Examination : ISC
Institute : Agrasain Balika Siksha Sadan
Board/University : Delhi Board
Percentage : 74%

XI ISC Agrasain Balika Siksha Sadan

Examination : ICSE
Institute : Agrasain Balika Siksha Sadan
Board/University : Delhi Board
Percentage : 75%

ACHIVEMENTS:

-Felicited by Regional Branch Head
for achieving highest revenue in the 2nd
quarter for FY 2021-2022

-Received 5 star audit rating in the
internal audit for the branch

-Successfully completed certification on
SAP FICO (consultant) from Interface

-Completed certification on Certified
Financial Accountants from Institute
of Company Accountant

-Successfully completed a course on
Advance Excel from Ashwini Bajaj

-Certification in Interior Designing

Professional Certificate

Year	Certification	Series	Certified By
2019	Technical Analysis	NCFM	NSE
2019	Equity Derivatives	NISM VIII	SEBI
2019	Currency Derivatives	NISM 1	NISM
2018	Commercial Banking Module	NCFM	NSE
2019	Investment Advisory Level-1	NISM XA	SEBI
2019	Research Analyst	NISM XV	SEBI
2018	Mutual Fund	NISM VA	SEBI
2018	Capital Market Dealers Module	NCFM	NSE
2019	Investment Advisory Level-1	NISM XA	SEBI

ERP Experience

- **FINACLE:** The main domain of Kotak Mahindra bank. Work as an inputter where in all the financial transactions takes place like Cash, RTGS, NEFT, Fund Transfer. Maintenance of Customer financial records, statement generation, generation of 15G, 15H forms, day end report generation for day end financial transactions, stop payment, clearing for cheques etc.
- **SIEBIL:** The customer management domain. Works as a manager for customer profile, where different instructions are raised like that of addition of holder deletion of account holder, processing deceased claim, keeping notes for record.
- **TI PLUS:** Works on this domain for bulk Foreign Exchange remittance for business purpose. This includes works like that of BOE updatation, advance payment, direct remittance.
- **Mercury-fx:** Works on this domain for the retail foreign remittance for educational, medical, gifting purposes.
- **SAP FICO:** 1-year experience on SAP FICO end-user project. Did a thorough study on the types of Master Data on which the company works, accounts payable cycle in the business, accounts receivable cycle in the business, phases of an asset cycle. Gained vivid idea about the accounts receivable and accounts payable works on SAP