

KHUSHBOO KHATWANI



PROFILE

- Operations Executive having 4+ years of experience in financial industry.
- Proficient in wide variety of Back office procedures including but not limited to Customer service, Administrative work, Data reconciliation, Operations management.
- Efficiently achieved individual goals in a systematic and logical manner.
- Possess excellent interpersonal communication and organisational skills.

+45 50 31 86 88

khushboo.khatwani92@gmail.com

Lykkesholmvænget 8E
1.3
5230 Odense M
Denmark

Languages: English,
Hindi

Nationality: India

EXPERIENCE

Sr. Ops. Executive, INDwealth, Gurugram, India — Feb '19—Feb '20

INDwealth (now known as INDmoney) is a fin-tech company which has created one AI driven umbrella app for managing user's money across investments, loans, taxes and expenses.

Responsibilities:

1. Executing mutual funds transaction requests received from clients.
2. Assisting cross-department relationship managers in resolving corresponding client queries by varied means of transaction processing, product purchase, payment assistance, documentation, other misc. services.
3. Individually worked on Portfolio Management Service and provided comprehensive assistance to all the clients.
4. Reporting customer faced application issues in JIRA, coordinating for resolutions.
5. Suggesting solutions for automating most of the backend processes of internal company portal and app, for faster execution and quick redressal of grievances.

Associate Research, Capital League, Gurugram, India — Nov '17—Feb '19

Capital League is an independent wealth management firm which manages user's investment portfolio and suggests investment options as per individual need.

Responsibilities:

1. Dealing with 3rd party brokers for products such as Bonds, FDs', PMS, MF.
2. Preparing products' proposals for the clients and coordinating with them for documentation and discrepancies.
3. Creating funds based models every quarter and using this model, suggesting best performing fund to the client.

Associate Operations, Capital League, Gurugram, India — Nov '17—Feb '19

Responsibilities:

1. In-charge for record keeping of all transactions executed over the day
2. Tracking each MF transaction next day to ensure it has been smoothly processed.
3. Supporting customer in MF form fill up and coordinating with various AMCs for form execution.
4. Providing end to end customer support.

EDUCATION

MBA (Finance) — IIFP, Bharathidasan University, India — 2014-2016

Diploma in Financial Planning and Wealth Management — IIFP (Indian Institute of Financial Planning), India — 2014-2015

BE (Electronics and Telecommunication) — CSIT, Swami Vivekanand Technical University, India — 2010-2014

SKILLS

Microsoft Office, Atlassian JIRA, InvestWell, BSE platform

REFERENCES

Based on request.