

Manashvi Tripathi

Preferred Relationship Manager (SR)

Responsible for managing and driving growth for B2B sales functions. Well trained in wealth management and identifying-generating-converting new B2B sales opportunities. My key skill is exploring new avenues for sales in all possible key account channels, creating tie-ups and partnerships with brands and institutions to generate sales and always looking out for ways to enhance value for respective stakeholders/clients.



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📍 Delhi

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WORK EXPERIENCE

SR Wealth Manager Edelweiss Broking Limited

08/2021 - 10/2022

Broking Company

Delhi

Roles and Responsibilities

- Taking care of B2B sales functions and wealth management.
- Maintaining client relationships and generating AUM Advising clients on their investments and managing their portfolio.
- Planning and Implementing Customer Acquisition Strategy.

Assistant Manager SUD LIFE INSURANCE COMPANY

07/2020 - 08/2021

Insurance Company

Delhi

Roles and Responsibilities

- Promote high-quality sales, supply, and customer service processes.
- Identify key personnel in client organisations in order to cultivate profitable relationships.
- Responsible for grooming new team members and promoting their growth.

Client Account Officer Indusind Bank Limited

10/2017 - 06/2020

Private Bank

Delhi

Roles and Responsibilities

- Meet with loan applicants to identify their needs and collect information for loan applications.
- Analyse active loan files on a regular basis and recommend solutions to speed up the loan process.
- Complete loan contracts and teach clients about policies and regulations.

Human Resource Officer Name Space Solution Private Limited

11/2016 - 05/2017

Lucknow

Roles and Responsibilities

- Manage employee performance. Leading an HR unit and developing local consultants for domestic candidates.
- Ensured that all relevant recruitment documentation (technical clearance, selection memo, comparative evaluation report, etc.) have been correctly completed.
- Directed pre-and post-acquisition analysis, consolidation, and equalisation of compensation, benefits, and employment policies for reinsurance and financial services companies.

SKILLS

Team Management & Team Player

Banking software like Finacle, Talisma & DCMS

Inside Sales

Office Tools

Digital Marketing

Active Listener

Capability to build strong client relationships

Marketo, Google Ads & SEO

EDUCATION

M.Com

Veer Bahadur Singh Purvanchal
University, Jaunpur

03/2015 - 04/2017

B.Com

Kumaun University, Nainital

11/2011 - 12/2014

Senior School

Saraswati Girls' Senior Secondary School

04/2011

ACHIEVEMENTS

Sud Life Insurance Company's top performer in Sales

INTERESTS

Book Reading

Painting

Music

Trekking

Interacting