

**Executive-Investor Services**

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Experienced investor services over three years in mutual fund industry. I am desirous of utilizing best practices for company with the role of investor services position.



**Jan-2015-May-2016: SBI Funds Management Company Pvt. Ltd. Pune**

* Resolved complaints efficiently to satisfy customers and encourage future transactions.
* Processed all types of transactions without any discrepancy.
* Maintained MIS of daily transactions.
* Handled walk-in customers and resolved their queries.
* Inbound calls- Handled inbound calls and delivered them good level of service to each customer by listening to concerns and answering questions.

**Feb-2017- Feb-2021: Quantum Asset Management Company Pvt. Ltd. Pune**

* Transaction processor-processing all types of mutual fund transactions without any discrepancy.
* Processed high value and liquid transaction in system and depositing cheques in respective banks.
* Actively listened to customers, handled concerns quickly and escalated major issue to supervisor.
* Processed KYC in respective KRA without any error and doing follow up for that KYC to get it registered.
* Maintained MIS of daily transactions, KYC received in branch, resolved queries and follow up cases record.
* Maintained records of inward-outward couriers.
* Out bound call to unregistered distributor introduce them about company products and request them to empanelment with us.

**Feb-2021- Sep-2021: Canara Robeco Asset Management Company Pvt. Ltd.**

* Transaction processor-processing all types of mutual fund transactions without any discrepancy, if there is any discrepancy solving the issue.
* Processed high value and liquid transaction in system and depositing cheques in respective banks and reporting the transaction to HO.
* Actively listened to customers, handled concerns quickly and escalated major issue to supervisor or solving at own follow up with team to get it resolved.
* CMS(Call Monitoring System) handling - queries assigned to me handle those queries with proper follow up team and resolved them in 5days TAT.
* Maintained inward outward record of the company.
* Handling walk-in investor, calls and their queries.



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| **2008-2012:** |  | **B.Com**  C. D. Jain College of Commerce, Shrirampur |
| **2012-2016:** |  | **MBA-Finance** |
|  |  | P.E.S’s Modern College of Engineering, Pune |



**2019** NISM certification course-V-A-Mutual Fund Distributors Certification.



* Technical skill- MS office
* Problem solving
* Responsibility
* Quick learner



* Travelling
* Listening music
* Photography



Languages Known- English, Hindi, Marathi

Gender- Male

Date of Birth- 14th January 1990

Blood Group- AB+

Marital Status- Married

Address- Tanish Homes, D-wing, 3rd Floor, Flat No.-301, Dighi, Pune-411015



I solemnly declare that all the information furnished in this document is free of errors to the best of my knowledge.

Place:

Date: Signature

**Anant K. Kumawat**