

# UPASNA DEWANGAN

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## Objective

Results-driven professional with a passion for contributing towards organizational goals through technical skills, innovation, creativity, strong curiosity, and a desire to acquire knowledge in revenue generation, relationship management, digital strategy, branch management, and financial services.

## Experience

### **CUSTOMER SERVICE RELATIONSHIP | BAJAJ ALLIANZ LIFE INSURANCE | OCT 2022 – SEP 2023**

- Worked on Renewals Calls, Supported Agency Channels and Managed Data.
- Acquired knowledge in the insurance market, investment planning, and financially independent retirement planning.

### **OPERATION MANAGER | BULLS CAPITAL COMPANY | JULY 2020 – JULY 2022 (2 YEARS)**

- Gained comprehensive knowledge of the financial market, including education services, mutual fund services, video editing, client data management, and demat services.
- Handled Client queries through visits, engaged in Fieldwork for Financial Literacy and recommended the right investment instruments based on their time horizon and risk tolerance.

## Technical Skills

- Proficient in MS Office applications: Word, Excel, PowerPoint
- Typing speed: 70 words per minute
- Experienced trader and investor in equity and debt
- Flyer, logos, and invitation intro design

## Other Skills

- Excellent communication and soft skills
- Strong presentation and group discussion skills
- Financial planning expertise and Equity Research Analyst
- Ability to generate innovative ideas

## Education

### **SECURITY MARKET | 2023 | INVESTMENT BANKING | ADVANCED EXCEL**

- 2023 : Pursuing Investment banking course online.
- 2023 : Certified Advanced Excel Course through Jobaaj Portal.

### **SECURITY MARKET | 2022 | MUTUAL FUND DISTRIBUTOR V(A) (NISM)**

- 2022 : Passed in NISM V(A) Mutual Fund Distributors Certification Examination.
- 2022 : Completed NSE Knowledge Hub, including Wealth Management & Insurance.

### **SECURITY MARKET | 2021 | SECURITIES MARKET FOUNDATION (NISM)**

- 2021 : Passed in NISM XII Securities Market Foundation Certification Examination.

## **BCA | 2017-2020 | AISECT COACHING AFFILIATED WITH CV RAMAN UNIVERSITY**

- 2020 : Banking and Finance Course Completed through National University Students Skill Development
- 2020 : Bachelor of Computer Application 3rd Year Completed
- 2019 : Bachelor of Computer Application 2nd Year Completed
- 2017 : Bachelor of Computer Application 1st Year Completed

## **12<sup>TH</sup> GRADE| SCIENCE STREAM | 2015 | DREAM LAND HR. SECONDARY SCHOOL**

- CGBSE Board: Passed with First Division 76.4% and 3 Distinction (Maths, English, Hindi).

## **10<sup>TH</sup> GRADE | 2013 | RAIPUR CONVENT HR. SECONDARY SCHOOL**

- CGBSE Board: Passed with First Division 72.16% and 3 Distinction (Maths, Science, Hindi).

### *Achievements*

- Certificated on Advnved Excel Course through Jobaaj Portal.
- Certificated on Career Edge offered by TCS ion through online.
- Certificated on NISM, Bharat ka Share Bazaar.
- Certificated on CDSL Certificate.
- Certificated on NISM V(A) Mutual Fund Distributors Certification Examination.
- Certificated on NISM xii Securities Market Foundation Certification Examination.
- Certificated on Drawing Competition.

### *Personal Vitae*

- Name : Upasna Dewangan
- Father's Name : Pardeshi Lal Dewangan
- Date of Birth : 15/Feb/1997
- Age : 26
- Language Known : English & Hindi
- Nationality : Indian

### *Interest & Hobbies*

- Passionate about financial planning for Future Security and Wealth Creation.
- Thrive on exploring new ideas and modifying existing ones.