

# SHRUTI JHA

BANKING & FINANCE OPERATIONS/  
BACK OFFICE/ CUSTOMER SERVICE  
PROFESSIONAL

## Contact Details

📞 : 8128404745

✉ : [shrutijha80@gmail.com](mailto:shrutijha80@gmail.com)

🏠 : B/16, Krishnaleela Society,  
Near- Manav Hospital,  
Harni Warasia Ring Road,  
Vadodara (Gujarat)-390006

in : <https://www.linkedin.com/in/shruti-jha-70a057112>

## Personal Details

DOB : 02<sup>nd</sup> February, 1991

Gender : Female

Status : Single

Language: English, Hindi, Gujarati  
& Maithili

## Education

- ❖ MBA(Finance) from C. K. Shah Vijapurwala Institute of Management (GTU) in 2015.
- ❖ B.COM from M.S. University of Baroda in 2011.
- ❖ H.S.C from S.K. School (GHSEB, Gandhinagar) in 2008.
- ❖ S.S.C from S.N. High School (B.S.E.B., Patna) in 2005.

## Professional Summary

Professional Executive with 4 years of experience in Financial, Import-Export & Outsourcing sector. Capable of handling operations, Co-ordination, Documentation, Drafting & Filing. Seeking to obtain challenging and responsible position in your organization wherein I contribute to the successful growth using my abilities and knowledge.

### • Work Experience

#### Executive- Operation

**Dec-2022 to till date**

CHECKMATE SERVICES PVT. LTD.- VADODARA, GUJARAT

- Taking feedback from PAN India client regarding the services and solve their queries/complain by coordinating with HO and respective branch.
- Preparing Satisfactory and Unsatisfactory report and sending to all branch.

#### Back Office Executive

**Nov-2021 to April-2022**

JK SECURITIES PVT. LTD. - VADODARA, GUJARAT, INDIA

- Handling all operational work-related Equity KYC & Mutual Fund.
- Compile, verify accuracy and sort information according to priorities to prepare source data for computer entry.
- Research and obtain further information for incomplete documents.
- Review data for deficiencies or error, correct any incompatibilities if possible and check output.
- Scan documents and print files, when needed.
- Co-ordination with Branch and HO.
- Customer query handling and solving at branch and via Phone, Email.
- MIS maintaining for day-to-day business.

#### Back Office Executive & Accountant

**March-2020 to Feb-2021**

RAVI ENERGIE PVT. LTD. - VADODARA, GUJARAT, INDIA

- Preparing Pre-Shipment Inspection Certification.
- Documentation, Filing and Drafting.
- Co-ordination with Client via phone and Email.
- US Accounting-Invoicing, payment follow up by email, payment process, update in ERP & TALLY.
- Tally Entry- Sales (for Invoices), Receipt (for payment).
- Bank reconciliation.

## Certification & Participation

- ❖ Certificate by ICICI direct for participated in Stock MIND 3.
- ❖ Certificate by Bharat Vikas Parishad for participated in group song competition.

## Technical Skills

- ❖ MS Office
- ❖ Tally ERP (Basic)
- ❖ V-Lookup & Pivot Table
- ❖ Basic Accounting Skills & Good in Filling Documents
- ❖ Operation Processing

## Functional Skills

- ❖ Reliable and responsible
- ❖ Convincing skills with logical mind
- ❖ Ability to communicate well
- ❖ Self-Confidence and great patience
- ❖ Willingness to learn
- ❖ Investment Client relation & Problem solving
- ❖ Research skill
- ❖ Team Worker
- ❖ Detail and goal oriented

## Hobbies

- ❖ Surfing Internet
- ❖ Watching News
- ❖ Reading
- ❖ Listening Music & Singing

## Back Office Executive

**Jan-2018 to July-2019**

URJA INVESTMENT PVT. LTD. - VADODARA, GUJARAT, INDIA

- Handling all operational work-related Equity KYC.
- Demat & Trading account opening (Client registration process starting to ending).
- Physical and digital (Online) Application Form fill up.
- DRF, Modification, Reactivation, Closure process.
- KYC and Client's document verification before process for Demat.
- MIS maintaining for day-to-day business.
- Scan documents and print files, when needed.
- Co-ordination with Branch, Exchange and RTA.
- Customer query handling and solving at branch and via Phone, Email.

## Back Office Assistant

**March-2017 to Aug-2017**

DNP FINANCIAL CONSULTANCY - VADODARA, GUJARAT, INDIA

- Handling all operational work-related Mutual Fund, FD and Insurance.
- Physical and digital (Online) Application Form fill up.
- KYC and Client's document verification before process.
- Customer query handling and solving at office and via Phone, Email.
- MIS maintaining for day-to-day business.
- Documentation, Filing and Drafting.
- Co-ordination with AMC.

## Process Improvement Specialist

**May-2016 to Dec-2016**

ENLIGHTENMENT 99 SOFTWARE CONSULTANTS PVT. LTD - VADODARA, GUJARAT, INDIA

- Work on web for recruitment process outsourcing
- Company Mapping
- Contact Mapping
- Sourcing

## **Internship**

**NJ India Invest Pvt. Ltd. Vadodara**

**June-2014 to July-2014**

**Summer Project:** “A Study on Investors Satisfaction Towards Financial Advisor”

- Learnt about various Investment product specially in the area of Mutual Fund.
- Analyzed how the financial advisory industry works.
- Opportunity to worked with sales and operation department of Mutual Fund.
- Opportunity to advice and aware about mutual fund to the new and existing client.

## **Project Details**

- **Comprehensive Project:** “A study on Customer Perception Towards Working Capital Finance by UNION BANK OF INDIA”
- **Global Project:** “A study on Comparative Analysis of Renewable Energy Industry of India and South Korea”