**SANJAY BOMMIREDDIPALLI**

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Achievement-driven professional with **nearly 19 years** of experience; targeting senior level assignments in **Stock Broking and Wealth Management** with an organization of high repute in **BFSI sector**

**Profile Summary**

* Currently working (from April’20 till date) as **South Zonal Head with BFSL** a subsidiary company of Bank. Company is into Credit Cards and Retail Assets. We are part of Bank sourcing credit cards and retails assets for the bank. I have a team of 5 Zonal Relationship officers ( State Heads) , 31 Regional Relationship Officers and foot on street team members who are stationed across bank branches in south for Sourcing Business from bank customer as well as from open market.
* Worked as VicePresident with **Tradebulls Securities** a new upcoming Stock Broking/ Wealth Management Company. Working towards expansion in South across AP/ TN and Kerala.
* I was previously associated with **HDFC Securities as Vice President**, heading 7 clusters & 2 state heads with a team of 225+ people, and deploying quarterly & annual plans, programs & policies for company managers
* Proven expertise in **developing & sustaining relationships with high-net-worth clients** by providing excellent financial planning services & investment advice and increasing their long-term wealth
* Successfully **started 22 branches in AP & Telangana and 5 branches in Tamil Nadu** of HDFC Securities; formulated operational policies & strategies as per the economic reforms & changing environment
* **Grew business revenue from 28 Cr. in 2014-15 to 98 Cr. in 2017-18;** steered efforts in making the region being the **second best at PAN India Level in sourcing** LI and MF consistently for 3 years in 2015-16- 16-17 & 17-18
* Experience in planning & designing successful **sales, sourcing & business development techniques / strategies / tactics** using customer and market feedback in Banking & Financial Services sector

**Core Competencies**

***Stock Broking Wealth Management New Set ups***

***Sales & Business Development Market & Risk Analysis Strategic Planning***

***Customer Relationship Management Branch Management People Management***

**Organizational Experience**

Oct’18-March’20 with Tradebulls Securities, Hyderabad As Vice President

Worked as South Regional Head Handling AP / TN and Kerala. Have to set up Branches across the region with a team Size of about 500+ members which would comprise of both sales and dealing team members.

**Jan’04-Sept’18 with HDFC Securities, Hyderabad**

**Growth Path:** Joined as Relationship Manager and rose to the position of **Vice President** in 2013

**Key Result Areas:**

* Heading 7 clusters and state heads as Regional Head for South and building & leading motivated high-performing & dynamic teams of 225+ people across 54 branches.
* Delivering strategic direction & planning in coordination with the senior management / leadership teams; creating growth, new money, and client expansion & retention goals; leading initiatives in pursuit of expanding the service platform and building an enterprise model
* Servicing HNI clients to make informed decisions on investing in the right equity, stocks & markets at the right time and creating portfolios (investment & equity) for them based on their risk / return
* Planning & developing strategies to successfully meet wealth objectives by interpreting financial information
* Working in the areas of asset management, prospecting, financial planning, relationship development & growth, and portfolio construction
* Proposing & implementing investment strategy while adhering to investment guidelines for client accounts; ensuring strategy is aimed at meetings clients' goals and risk tolerance level
* Presenting customized models and financial plans for prospective, new and existing clients
* Monitoring the movements in the market and the drivers of change

**Highlights:**

* Set a landmark in **launching 22 branches in AP & Telangana and 5 branches in Tamil Nadu**
* **Overachieved targets** in terms of Mutual Fund & Life Insurance sourcing y-o-y
* Selected 3 times for **attending training programs overseas in Bangkok / Amsterdam** and **Tashkent** for achieving targeted numbers of Life Insurance Business apart from being in top 2 sourcing regions Pan India.
* **Won 2 LI Contests** in 2016-17 & 2017-18 and **3 MF Contests** in 2015-16, 2016-17 & 2017-18 as Regional Head
* **Received certificates 3 times** for mutual fund sourcing

**Previous Experience**

**Dec’00-Jul’02 with Geojit Securities as Senior Relationship Manager / Branch Incharge**

**Highlight:**

* Successfully built a customer base of about 200-250 for equity trading / product sourcing and later on worked as Branch Incharge handling branch for 6months.

**Apr’99-Aug’00 with Karvy Consultants as Team Lead**

**Key Result Areas:**

* Ensured on-time issue of refund orders (IPOs) to customers. Managing a team of 7 people. Was responsible for post issue refunds order of companies like Cadila Healthcare / Corporation bank/ Sree Rama multi tech

**Education**

* Post Graduate in Management / MBA (Finance) from Osmania University in 1998
* B.Com from Osmania University in 1996

**Personal Details**

Date of Birth: 2nd April 1976

Languages Known: English, Hindi and Telugu

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