

SHUBHAM YADAV

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Secure a responsible career opportunity to fully utilize my training and skills, while making a significant contribution to the success of the company.

SUMMARY

Financial Adviser with a proven history of establishing valuable relationships with each client. Adept at utilizing a variety of computer software platforms to manage accounts and maintain customer service notes. Specialized expertise in enhancing workflow and improving the customer experience.

EXPERIENCE

KOTAK MAHINDRA BANK GURGAON, INDIA

Portfolio Relationship Manager

09/2021- Current

- Developing new and expanding existing High Net worth Customer (HNI) relationships for liabilities by sourcing customers.
- Informs customers of new products or product enhancements to further expand the banking relationship.
- Monitors department issues and client complaints.
- Handles all customer escalations and other service parameters of branch.
- Ensuring the safety of investors' funds, earning maximum returns, and giving them timely advice to keep up with the market trends.

ICICI BANK GURGAON, INDIA

Wealth Manager

05/2019 to 09/2021

- Monitor and address HNI clients banking and investment requirements.
- Use financial acumen and investment expertise to review a client's profile.
- Fostered strong relationship with clients and assessed clients in specific investment needs based on risk tolerance and time horizon.
- Align clients needs through superior service and seamlessly align service delivery for the enhanced experience; thereby helping the client reach short term and long term investment goals.
- Focus on business development across liabilities, assets & fee to sustain and achieve growth in relationship value, revenues & improved client stickiness.

OYSTER CONNECT

Intern

04/2018 to 06/2018

OysterConnect is a product of this new dynamic.

OysterConnect.com facilitates collaboration between students and Companies to help businesses to execute critical projects. Its unique platform that enhances the work skills of students at all levels of formal education by an innovative system of Industry-sourced Live Projects & Virtual Internships.

Internship under 2 projects

• Trip Advisor

Market Research & analyze the sourced data.

• Shiksha.com

Research about the top educational institutions and analyze the collected reviews

IMRB-KANTAR
NEW DELHI

Intern

11/2017 to 11/2017

- Market Research on customer taste and preferences about the new product launched.
- Conducting Primary research for better understanding of customer need.

SKILLS

- | | |
|------------------------|---|
| • CLIENT SERVICING | • PRESENTATION AND COMMUNICATION SKILLS |
| • PORTFOLIO MANAGEMENT | • STRESS MANAGEMENT |
| • NETWORKING | • COLLABORATIVE WORKING STYLE |
| • WORK ETHICS | |

EDUCATION

PGDM – Marketing and Human Resource	2019
IMM- FOSTIMA BUSINESS SCHOOL, NEW DELHI	
B.COM	2017
SRI AUROBINDO COLLEGE, DELHI UNIVERSITY, NEW DELHI	
12TH	2014
ARMY PUBLIC SCHOOL, DELHI CANTT, NEW DELHI	
10TH	2012
ARMY PUBLIC SCHOOL, JAIPUR CANTT, JAIPUR	

AWARDS AND ACHIEVEMENTS

- Received an appreciation from the management for enriching the customer's experience and thereby increasing the overall customer's happiness quotient.
- Awarded as Outstanding Performace in quarter 4 by ICICI PRUDENTIAL- 2020
- Qualified Fantastic Feburary 2021 launched by ICICI WEALTH MANAGEMENT.
- Awarded as Star Performer by OYSTER CONNECT- 2018
- Awarded as Best Community Service Provider by UNHAD FOUNDATION- 2016
- NISM & AMFI CERTIFIED { Continuous application throughout the current employment. }

EXTRACURRICULAR ACTIVITIES

- Community Head at UNHAD FOUNDATION 2015.
- Working with ARYA MAHILA ASHRAM, OLD AGE HOME 2016.
- Conducted and Hosted Various Events/Functions.