

# SHUBHAM YADAV

BLOCK C-1408 FIRST FLOOR, PALAM VIHAR, GURGAON 122017 India |  
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## Professional summary

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I am a flexible and passionate individual with excellent time management skills. I am a good communicator with proven inter personal skills and am used to working in a team whilst also being capable of using own initiative. I am skilled In dealing with problems in a resourceful manner and negotiating to achieve beneficial agreement. I am always enthusiastic to learn and undertake new challenges.

## Skills

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- Team Player
- Client Servicing
- Presentation and Communication
- Project Management MS
- Office
- Agile Methodologies

## Experience

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### Portfolio Relationship Manager Kotak

09/2021 to Current

#### Mahindra Bank – Gurgaon

- 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.

### Wealth Manager ICICI

05/2019 to 09/2021

#### Bank – Gurgaon

- 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**

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.

**Intern**

11/2017 to 12/2017

**IMRB KANTAR** – New Delhi

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

**Education**


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<b>PGDM:</b> Marketing	Apr 2019
<b>IMM- FOSTIIMA BUSINESS SCHOOL</b> - New Delhi	
CGPA: 8.5	
<b>B.Com:</b> Commerce	Apr 2017
<b>Sri Aurobindo College, Delhi University</b> - Delhi	
Percentage: 75.9%	
<b>12th:</b> Commerce	Apr 2014
<b>Army Public School</b> - New Delhi	
Percentage: 80	
<b>10th:</b>	Apr 2012
<b>Army Public School</b> - Jaipur	
Percentage: 72	

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## Awards

- 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. Best Speaker Award - Event held in Fostiima
- Business School-2019
- Awarded as Star Performer by OYSTER CONNECT- 2018
- Awarded as Best Community Service Provider by UNHAD FOUNDATION - 2016

## Hobbies

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- Travelling
- Community Services: NGO's