

## Date Of Birth

16 January 1983

## Address

Gudyari Raipur  
492001

## Mobile

7489793038

## Experience

# VIJAY SURYAWANSHI

## Operation Associate

[vijay.suryawanshi14@gmail.com](mailto:vijay.suryawanshi14@gmail.com)

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10+ years above insurance operation professional working experience with different life insurance companies.

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## OPERATION Officer (Dec 2015 To Till date)

### Star Union Dai chi Life Insurance

Handling the complete Operations of a Branch including Administration as well as Service delivery. Publishing MIS to ZM's of SUD and stakeholders (UBI and BOI bank branches) .

Handling policy service request which is received from UBI and BOI bank.

Co-coordinating with sales team for processing new business well as maximize the issuance for increasing region portfolio. Handling the cash transactions for the branch related to policies collected

Taking care of Vendor Payments

Monitoring Sales Team and Helping them in Reaching Target Getting customer's reference to generate new leads. Handling customer complaints with due diligence and follow with HO for satisfactory resolution.

Highlighting all suspicious cases to FCU team for further investigation.

Ensuring that no any major observation notice by external as well as internal auditor during the audit .Also achieved outstanding score while audit done .

Keeping branch hygienic where in audit no high risk observation has been found.

Processing of UBI and BOI specified person code generation.

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## Business Services MANAGER (JULY 2015 TO Nov 2015)

### PNB MetLife India Insurance Company

Handling recruitment processing of financial advisors and following up with HO for code generation.

Processing of PNB specified person code generation. Fresh business processing for entire region also guide sales team to ensure cases sent as FTR.

Flash requirement pending and new business application pivot to entire team with keeping ZM in loop on daily basis to keep the traction.

Arranging the Branch review in regards of compliance in every month at local level to avoid any gap in terms of process adherence.

Handling customer walking for servicing and renewal receipting .Share authentic details to customer for reduce customer complain and work on customer centricity. Take the ownership and float PPT regarding new process flow to entire operation team to better understanding of new process.

My profile was Branch Service Manager hence all the administration, HR related activity and branch stakeholder issue resolve immediately to avoid further escalation.

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## BRANCH OPERATIONS Officer (July 2010 to Jun 2015)

### Bhart Axa Life Insurance

Handling Indore branch Operations and Administrations.

Handling Petty Cash.

Conducting DC Audit and UHCI Governance meet on monthly basis.

Had an experience of Branch inauguration and setup of the new branch in the initial phase..

Achieving branch issuance target.

Conducting monthly operations training for Life Advisors and Manager of Agencies.

Quality checks on the applications underwritten.

SPOC for various activities across the region

Doing the Branch Certifications in branch.

Clearing Vendor bills after doing necessary verifications.

Compliance Communications.

Provide the customer service like surrender, free look cancelation, address change .fund switching, assignment and financial request processing with accuracy

Directly in-tract with customers for satisfaction regarding queries and handling complains and resolved on self-level

Processed the death claim as per define TAT without any discrepancy and provide the fund value within 48 hours after the submission of death claims.

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## Customer Service REPRESENTATIVE (JULY 2009 TO JUNE 2010)

Bajaj Allianz Life Insurance

New business scrutiny, cash and cheque handling, vault operation, stationery management and petty cash management.

Responsible for Cash and Customer transactions Cash Receipts, Deposits Lobby Management

Resolution of customer queries/complaints

Managing vault limits & vault custodian

Supervising all Non-Cash transactions like DD/MC, fund transfer etc.

Reconcile all Suspense accounts and maintain the register Maintain all registers branch operations & Administration. Branch batch opening/closure

Review Branch reports like End of day (EOD) cash position report, Instruments issued etc

Monitoring of dummy accounts, suspense accounts, deferred accounts, accounts payable/ receivable, Reconciliation and maintenance of suspense accounts register as per the required formats.

Compliance Communications.

Co-ordinations with sales team .

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## BACHELOR'S In Science (March2001 –June 2004)

Government College

Graduate from Dr. Harishing Gour University Sagar

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Hard working, Attentive, Leadership, communication, Self-motivated, Decision Making

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Windows XP,  
Window 98,  
MS OFFICE,  
Outlook Express,  
Lotus Notes.  
Excel –PIOV T ,V LOOKUP,ANALYTICAL CHART .

EDUCATION

Skills

TECHNICAL  
Expertise

LANGUAGE  
Proficiency

Achievements

DECLARATION

DATE AND PLACE

SIGNATURE

English and Hindi

- 1.Goa Trip qualified in Bajaj Allianz Life Insurance in 2009 on the achievements of renewal collection and getting the certificate from COO.
- 2.Getting performer trophy in Bharti Axa Life Insurance on achievements of digital customer policy issuance.
- 3.Top issuance branch certificate from HOD in Bharti Axa .
4. Unclaimed ke sartaj certificate for from HOD in clearing unclaimed bucket in sud life.

I hereby declare that the above given details are correct to the best of my knowledge.