

Anjali Tarak Meheta

DOB: 23rd October 1993

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404, Gordhan Park Society, Behind Indovasc Hospital, Old Vadaj, Ahmedabad – 380013

Career Objective

To utilise my skills and knowledge in the field of investment/portfolio management in fostering individual growth and serving as an asset to my employer.

HDFC Bank Ltd. (Mumbai) (October 2019 – August 2021)

HDFC Bank Ltd. (Ahmedabad) (September 2021 – Till date)

Key Responsibility:

- Acquisition of new customers and maintaining a portfolio of over 250 clients including NRI clients.
- Supports the Bank's strong relationship banking culture through ongoing customer contact, quality customer service, and superior product knowledge.
- Enhancement of the relationship by cross-selling products and services as per the profile & need of the customers.
- Retention of the customers by providing the best possible services and being the dedicated point of contact for these customers.
- Smooth operational experience for customers.

ICICI BANK (Mumbai) (July 2017- September 2019)

Key Responsibility:

- Develop strategies for acquiring, retaining and growing existing accounts with identification of new business opportunities.
- Relationship manager for more than 200 customer including NRI clients.
- Providing best possible solutions to NRI customers related to remittances and investments.
- Business and sales volume generation for Retail Forex products through existing and new Corporate clients for servicing their forex requirements.
- Achieving sales targets in terms of volumes of Foreign Currency sales through Travel Cards, Currency notes and Outward wire transfers.

ACADEMICS

YEAR	DEGREE	INSTITUTE	BOARD/UNIVERSITY	RESULT
2015-2017	MBA	MET Institute of Management, Bandra, Mumbai	Asian Management Development Centre	71%
2014	BMS	M.M.K College of Commerce and Economics, Bandra, Mumbai	Mumbai University	70%
2011	HSC	H.R College of Commerce & Economics, Churchgate, Mumbai	Maharashtra Board	70.33%
2009	ICSE	Lilavatibai Podar High School, Santacruz, Mumbai	University of Delhi	72.71%

PROJECTS UNDERTAKEN

- Financial Strategies in Retail Stores
- Six Sigma
- Project on Union Bank of India

ADDITIONAL INFORMATION

- Computer Skills : Microsoft Office.
- Interests : Badminton & Music
- Languages : English, Hindi, Sindhi