



SUMMARY

6+ years of experience and Client service professional with extensive experience in the RFP / DDQ process and Wealth Management sector. Detail-oriented team player possess cross- functional skills such as : synthesizing large sets of data, product marketing and managing many deadline driven projects simultaneously. Solid team player who offers a positive and cooperative attitude.

EDUCATION

Army Institute Of Management, Kolkata

MBA (2016-2018)
Major : Finance. 7.56 YGPA

University Of Allahabad

B.Com (2012- 2015)
Commerce, 61.60 %

SKILLS

- Strategic Planning
- Project Coordinating
- Superb Writer & Editor
- Detail- Oriented
- MS Office proficient
- Deadline-driver
- Superior Communication Skills
- Extremely Organized
- Ability to write technical documentation, perform document layout
- Strong proofreading skills
- Well versed in a variety of proposal concept, practices and procedures.

CERTIFICATIONS

- NISM- Mutual Fund Series V

INTERNSHIP

Bank of India (July 2017- Sep 2017)

Project : Credit Appraisal & Risk Management

- Banking Operations & Servicing
- Analysis & Interpretation of Accounting Ratios & Financial Statement

Green Field Financial Services Ltd. (Aug 2017)

- Accounting of Partnership Firm
- Record Keeping, Reporting & Analysis of Business transactions

PROFESSIONAL EXPERIENCE

RFP / DDQ Writer- Senior Associate

Acuity Knowledge Partners Ltd | June 2022 - Present

- Upholds efficiency in the RFP process through in depth understanding of all department information.
- Serve as Central Project Manager responsible for decreasing the turnaround time for each project and increasing the number of RFP supported.
- Create competitive proposals through language customization and effective communication of solution while supporting 200+ formal RFPs & DDQs in less than 2 years.
- Develops and implements process improvements to help improve proposal quality.
- Work with SMEs to update and maintain database responses in addition to performing periodic updates to assigned sections.
- Working knowledge of & Experience with proposal software and content management system like Qvidians.
- Work with proposal team to develop and streamline technical approach.
- Experience meeting tight deadlines with limited resources.
- Innovate to constantly improve our approach to responses.
- Seeking and coordinating timely input from the relevant subject matter experts.

Wealth Management Professional- Account Manager

Anand Rath Private Wealth Ltd | Feb 2018 - May 2022

- Financial Planning, Portfolio Management of HNIClients.
- Take Investment decision on various parameters.
- Assessing funding requirement, determining client's repayment capacity & addressing their financial requirements.
- Reporting, presenting, monitoring & analysis of portfolio performance.
- Identifying opportunities within the client existing portfolio.
- Attending to client financial queries.

ACHIEVEMENTS

- Initiated & Assisted with Onboarding highest number of HNI Clients in Kolkata Region which lead to Business development enormously
- Worked on 200+ formal RFPs & DDQs in less than 2 years.
- Awarded AWES & TATA Scholarship of INR 1.4 Lakh for good academic performance