SAKSHI SRIVASTAVA

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Bangalore

SENIOR RFP / DDQ WRITER (FIXED INCOME PRODUCTS)

Portfolio Link

SUMMARY

Senior Professional Writer and Editor with 6 year of experience in Finance Industries. Dynamic and Result oriented Wealth Manager with 4 + years of experience working directly with HNIs. Detail-oriented team player possess cross- functional skills such as : synthesizing large sets of data, product marketing and managing multiple deadline driven projects simultaneously. Solid team player who offers a positive and cooperative attitude. Eager to contribute expertise to a progressive company.

EDUCATION

Army Institute Of Management, Kolkata

MBA (Major in Finance) : 7.56 YGPA

University Of Allahabad

B.Com : 61.60 %

SKILLS

- Superb Writer & Editor
- Detail- Oriented
- MS Office proficient
- Deadline-driven and Quality Assurance
- Superior Communication Skills
- Extremely Organized and Creative
- Strong proofreading skills
- Well versed in a variety of proposal concept, practices and procedures.
- Portfolio Management
- Relationship Management
- Strong Networking

CERTIFICATIONS

- NISM- Mutual Fund Series V

ACCOMPLISHMENTS

- 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.

PROFESSIONAL EXPERIENCE

RFP / DDQ Writer- Senior Associate

Acuity Knowledge Partners Ltd | June 2022 - Present

- Upholds efficiency in the RFP / Proposal process through in depth understanding of all department function.
- Analysing client requirements, proposing solution architectures, and developing value propositions.
- 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.
- Engagement with potentil parties through effective communication about services.
- Innovate to constantly improve our approach to responses, proposal template.
- Seeking and coordinating timely input from the relevant subject matter experts.

Wealth Management Professional- Account Manager

Anand Rathi Private Wealth Ltd | Feb 2018 - May 2022

- Provided comprehensive financial guidance to our high net worth clients.
- Successfully built, grown and retained long lasting client relationship.
- Developed and implemented efficient financial planning strategies.
- Responsible for identifying and engaging new clients.
- Conducted in-depth assessment to identify areas for growth and improvement.
- Monitor and review investment performance, conducting periodic portfolio rebalancing to align with clients' objectives.
- Collaborate with internal teams to coordinate complex financial transactions.
- Participated in and successfully conducted industry conferences and seminars to expand knowledge and network with potential clients.