**Roshan Jagannath**



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Seeking a challenging opportunity in Banking Industry for personal and professional growth

**PROFILE**

* Sincere & diligent Professional with overall 7+ years of experience including 4+ years in Banking and Financial Institution.
* A keen administrator with expertise in managing trading functions to meet corporate financial goals while being abreast with all the latest financial developments.
* An enterprising leader with strong analytical, problem solving & organizational abilities complemented by a passion for achieving high quality at work.
* Ability to meet customer service standards by providing appropriate solutions for the queries and complaints.
* Adept at servicing clients on international business issues by developing forecasts in compliance with financial developments in foreign economies affecting clients and the organization.
* Excellent planning, execution, monitoring and resource balancing skills, attention to detail as well as the ability to build and lead effective teams.
* Efficient leadership & people management skills in planning, prioritizing, scheduling & monitoring while motivating, mentoring, proactive resolution and skill upgrade of the team for performance excellence.

**CORE COMPETENCIES**

🞛 Leadership & Supervisory Skills 🞛 Liaising / Coordination 🞛 Reporting & Documentation 🞛 Customer Relationship Management 🞛 Communication Skills 🞛 Interpersonal Skills 🞛 Team Management 🞛Trade & Working Capital Financing 🞛MS Office - 2008

**PROFESSIONAL EXPERIENCE**

**RAK BANK, UAE SEP 2012 – JAN 2016**

**Senior Relationship Officer – SME Trade & Working Capital Finance**

* Working as a relationship officer for Rak Bank
* Acquiring new clients to the bank for SME Trade & Working Capital Finance
* Analyzing the customer portfolio and advising the suitable product for his business
* Analyzing the balance sheet and bank statements of the client
* Verifying the related documents and doing due diligence of the client
* Preparing business visit report, LAF, structure and also solving credit queries
* Effectively addressing and resolving operational issues and concerns in a timely fashion

**INDUSIND BANK, INDIA JAN 2012 – JULY 2012**

**Relationship Manager – Retail Banking**

* Worked as a priority banker with Indusind Bank
* Well versed with all the operations involved in Retail Banking
* Efficiently educating operations team on best practices, company policies and service excellence standards
* Used to handle customer queries across the counters and even visit customers at their address for solving their queries.
* Have experience in cross selling different banking products to them including life insurance, general insurance, fixed deposits, accounts, home loans, auto loans, credit cards etc
* To deal with Savings account, Current account, NRE/NRO account.
* Manager in different operational issues and promotional activities and accordingly evaluating current operational strategies and recommending improvements.

**HDFC Life, india Apr 2011 – Jan 2012**

**Sales Development Manager**

* Worked as a Team Leader and was handling a team of 20 DSA’s to source Insurance Policies related to health and life
* Managed a team of DSA staffs to source Insurance policies from market.
* Managed a team of Financial Advisors who generate business from the market
* Meeting prospected clients with Advisors as well as DSA’s and closing the deal
* Efficiently managed walk-in customers and converted them into the clients while maintaining healthy relationship with the existing clients.

**hdfc lTD, INDIA JULY 2010 – MAR 2011**

**Home Loan Counselor**

* Worked as a Customer service officer and also as a home loan advisor.
* Meeting Builders & Real Estate Agents to generate new business.
* Preparing project report and also meeting advocates for project approvals.
* Majorly dealing with NRI clients and preparing financial report and loan calculation
* Preparing loan sanction report before registration.

**Icici prudential SEPT 2008 – Oct 2009**

**Associate Health Assurance Manager**

* Worked as a Manager and was dealing with health assurance products
* Was handling advisors mainly proprietor of Pharmacies and also financial advisors.
* Recruiting new agents and generating business.
* Meeting new clients and closing deals.
* Attending seminars and advising agents for IRDA license.

**EDUCATION CREDENTIALS**

* **Bachelor of Commerce (BCOM)**, Shree Gokarnatheshwara College, 2008
* **PUC** – Department of Pre University Education Karnataka, 2005
* **KSEEB** – Karnataka Secondary Education Examination Board, 2003

**PERSONAL DETAILS**

**Date of Birth**: 11th May 1987

**Languages Known**: English, Hindi, Malayalam, Tamil, Kannada, Tulu, Konkani