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| C:\Users\managerlife\Desktop\image1.JPGC:\Users\managerlife\Desktop\image1.JPG**YOGITA** **yogita.336176@2freemail.com****BANKING & INSURANCE OPERATIONS** Targeting challenging assignments in **Insurance Operations / Branch Banking / General Administration**with a growth driven organization preferably in Banking & Insurance sectoryogitasijo@gmail.com+971557424310 |
| knowledge24x24icons Profile Summary |
| * An achievement-driven professional with **over 13 years** of diverse experience in Banking, Insurance& Financial Services industry
* Fueled next-level performances in multi-functional environments entailing wide spectrum of activities including sales, business developmentand people leadership
* Extensive knowledge in Individual Life Insurance, Underwriting, Customer Service and Management, Insurance Operations, Bank Assurance, Product Training
* Drove process improvements throughout the operations; improved operating performance of application processing, policy issuance,policy servicing,Claims settlement, commissions and customer service
* Led the entire administration servicing (Dubai& Abu Dhabi & overseas) & distribution of work through email & work systems
* Unique blend of leadership with functional expertise to lead strategic planning, business model re-structuring, and effective management of cultural and organizational diversity
* Enterprising leader with capabilities in leading motivated teams towards achievement of organisational goals and adherence to industry best practices
* Possess good & healthy relationship with the Life Providers in Dubai
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| edu24x24iconsEducation |
| * B.Com. from D.G. College of Commerce, Shivaji University, Maharashtra in 2000
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| core24x24iconsSkill Set |
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| Banking & Insurance Operations  | Wealth Management  | Compliance Management  |
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| Process Enhancement  | New Business Development  | Business Risk Management  |
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| Branch Administration | Product Portfolio Management | Client Relationship Management |
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| career24x24iconsCareer Timeline**May’06-Apr’07**ICICI Prudential Life InsuranceCompany as Customer Support Supervisor**Oct’07-May’08**MetLife India Assurance Company as Financial PlanningConsultant**Jul’08-Apr’15**Globaleye WealthManagementDubai as Operations (Team Leader)**Since Jun15-Dec16**Omega Insurance Brokers LLC, Dubai as Operations(Manager)**Mar’04-Apr’06**Sai Associates and Financial Services as Sales Coordinator **Jun’00-Feb’02**Shree Sai Finance as Customer Care Executive**Jan’98-Jan’99**Janata Sahakari Bank Ltd. as Trainee  |
| exp24x24iconsWork Experience |
| **Jun’15-Dec’16** |
| **Omega Insurance Brokers LLC, Dubai as Operations (Manager)** |
| **Key Results Area:*** Analyzed information in insurance applications processed for issuance after first level of risk assessment
* Imparted training to candidates related to all operations, renewal, admin and to sales people related to ops circular, underwriting; organizing training programs and seminars
* Maintained branch records and periodically submitted the reports to management for decision-making purposes
* Tracked the daily volume of new business, servicing and commissions processed by team ensured it is completed in the turnaround time
* Monitored the process to ensure operational efficiency; streamlined processes to ensure smooth functioning of the business operations
* Improved the ratio of clean paperwork and sensitivity towards anti-money laundering (AML) documents
* Maintained cordial relations with providers and sales channel to maximize the issuance and meet the required expectations
* Coordinated with renowned providers tounderstand their concerns and apprehensions, thereby support them to maintain the reputation of broker
* Managed customer centric operations and ensured satisfaction by achieving service quality norms
* Dealt with orphan and direct clients for mortgage and Keymanof new business and servicing

**Significant Accomplishments:*** Ensured compliance with Insurance Regulatory and Insurance authority of Dubai rules & regulations aPlease adjust the wording
* Monitored capability building of branch employees in the cluster for the Life Insurance Business which grew from
* Achieved an increase in number of policy sustainability at88%  and a total logging last year sustainability was at 80.94%
* Handled successfully the client complaints and provided the maximum beneficial solutions to the clients
* Handled all exceptional cases to resolve on a higher priority
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| **Jul’08-Apr’15****Globaleye Wealth Management, Dubai as Operations (Team Leader)** |
| **Growth Path:****Administrator - New Business& Servicing (Jul 2008 to May 2011)** **Operations- Team Leader, Policy Servicing (June 2011 to Apr 2015)****Significant Accomplishments:*** Administered the entire servicing operations & distribution network in Dubai & Abu Dhabi of work through email & work systems
* Coordinated with global offices in Singapore, Hong Kong, Malaysia, Switzerland, Russia, China and local offices in Abu Dhabi to oversee the administration
* Maintained new business servicing and arrears cases and prepared reports in a timely manner
* Directed the life assurance, savings, pensions and lump sum investments department policy & serviced area of the business
* Executed administrative functions related to new business and assisted all life providers
* Acknowledged for maintaining the highest record of clean paperwork for new business and servicing
* Gained expert in checking the anti-money laundering (AML) documents as per regulatory prospects
* Scheduled induction program related to the administrative department for newly joined Wealth Mangers and Admin
* Maintained very good bond with all life provider
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| **Oct’07-May’08****MetLife India Assurance Company, Satara, Maharashtraas Financial Planning Consultant** |
| **Significant Accomplishments:*** Extended end-to-end customer solutionsfor financial needs like retirement, education, medical cover, critical illness and protection
* Maintained relationshipswith channel partners like Karnataka Bank
* Enhanced new business opportunitiesand rolled out company’s new schemesand promotions
* Recognised thebusiness opportunities and created markets for business

Previous Experience**May’06-Apr’07****ICICI Prudential Life Insurance Company, Satara, Maharashtra as Customer Support Supervisor****Mar’04-Apr’06****Sai Associates and Financial Services, Satara, Maharashtra as Sales Coordinator** **Jun’00-Feb’02****Shree Sai Finance, Satara, Maharashtra as Customer Care Executive****Jan’98-Jan’99****JanataSahakari Bank Ltd., Satara, Maharashtraas Trainee**Certification* Graduate in Tally, PCWE (Web Designing) from Arena Multi Media in 2001
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