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| C:\Users\managerlife\Desktop\image1.JPGC:\Users\managerlife\Desktop\image1.JPG  **YOGITA** [**yogita.336176@2freemail.com**](mailto: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 sector  yogitasijo@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 |
| edu24x24iconsEducation |
| * B.Com. from D.G. College of Commerce, Shivaji University, Maharashtra in 2000 |
| core24x24iconsSkill Set |
| |  |  |  | | --- | --- | --- | | Banking & Insurance Operations | Wealth Management | Compliance Management | |  |  |  | | Process Enhancement | New Business Development | Business Risk Management | |  |  |  | | Branch Administration | Product Portfolio Management | Client Relationship Management | |  |  |  | |
| 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 Wealth  ManagementDubai 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 |
| **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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