## **CURRICULUM VITAE**

**KRUPALI**

Sharjah, UAE.

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* **OBJECTIVE:**

To associate with an organization which progresses dynamically and gives an opportunity to update my knowledge and enhance my skills and be a part of a team that excels in work towards the growth of the organization.

* **SKILLS:**
  + - * Strong communication, interpersonal and analytical skills

Using resources efficiently.

* + - * Team Player with an ability to grasp new things quickly.
      * Ability to handle multiple functions and activities in high-

Pressure environments with tight deadlines and goals.

* **EMPLOYMENT:**

2016 – 2017 Mega Financial Planners

Operation Manager

2015 – 2016 Prudent Corporate Advisory Services ltd.

Customer Relationship Officer

2011 – 2015 Mega Financial Services Operation Head

2009 - 2010 Mega Financial Planners

Admin Executive

* **WORK PROFILE :**

1. **Worked as Operation Manager at Mega Financial Planners.** a Firm based in Rajkot, Gujarat, India.( Firm dealing in Financial Planning / Advisory and distribution of all kind financial products covering Mutual Funds, Insurance, Demate, Fixed Deposits, Bonds, Debentures etc.)
   * + - Overview the transactions for Mutual Fund, Insurance, Fixed Deposits and Bonds.
       - Handling queries and communicates to respective companies.
       - Maintaining post-sales relationship with existing customers
       - Preparing research reports for Mutual Fund.
       - Establishing contact, developing relationship and Explaining different products and procedure to prospect clients.
       - Leading a Sales team as well as Back office to achieve their goals.
       - Determining needs of human resources, hiring employees, Training of employees, overseeing assignment of employees and planning staff development.
       - Preparing Service Tax Files in the support of CA. Maintaining Income and Expenditure of Firm. Onward preparing GST files.
2. **Worked as CRO at Prudent Corporate Advisory Services ltd.** Rajkot Branch, Gujarat, India. (It offers financial services to individuals and corporate to help them achieve their financial goals through Mutual Funds, Debt and Third party products.)
   * + - Handling operation for Mutual Fund, Insurance, Fixed Deposits and Bonds.
       - Responsible for Branch Compliance.
       - Accept and pre-process client applications and queries before handing off to CAMS or respective AMCs.
       - Liaison with CAMS for deal details, queries etc.
       - Providing excellent, proactive service to Advisors to enhance and further develop the relationship.
       - Supporting the sales team in gathering / increasing assets through proactive support of sales and marketing campaigns.
       - Accepting application NIGO checking, Uploading Images, Distribution of application respective AMCs.
       - Handling Petty Cash.
       - Preparing Daily MIS and Monthly Dashboard of Branch.
       - Dispatching weekly report to respective Distributors.
3. **Worked as Operation Head at Mega Financial Planners-** a firm based in Rajkot, Gujarat, india. (Firm dealing in Financial Planning / Advisory and distribution of all kind financial products covering Mutual Funds, Insurance, Demate, Fixed Deposits, Bonds, Debentures etc.)
   * + - Analyze the quality people and Recruiting them. Train the new employees. Managing their work responsibility.
       - Overseeing and handling the resolution of any problems that might arise by liaising effectively with other departments, ensuring the client is kept appraised and confident of prompt resolution.
       - To check out mutual fund transactions, handle client at front desk, and communicate with concerned Asset Management Companies for operational aspects and queries.
       - Explaining all mutual fund products and procedures clearly and simply to clients.
       - Also worked as Data administrator and handling the Mutual Fund software named Funds Magic and Invest well.

* **Educational Qualifications:**

MBA (HR)

* **Academic records:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **EDUCATION** | **INSTITUTION** | **UNIVERSITY/**  **BOARD** | **YEAR** | **PERFORMANCE** |
| MBA (HR) | Distance Learning | IGNOU | 2013 | 64% |
| M.COM (Finance) | External | Saurashtra  University | 2010 | 54.45% |
| B.COM | Lt. M.J.Kundaliya | Saurashtra  University | 2008 | 68.48% |
| HSC | Masum Vidhyalay | G.H.E.B | 2005 | 65% |

* **EXTRA CURRICULAR:**

**Accounting Package**: Tally– Basic Operating Knowledge.

**Packages** : MS-Office, Outlook, Internet.

* **PERSONAL PROFILE:**

NAME : Krupali

DATE OF BIRTH : August 9, 1988

MARITAL STATUS : Married

LANGUAGE KNOWN : English, Gujarati, Hindi

HOBBIES : Listening Music

VISA STATUS : On Husband Visa

**Declaration:**

I am confident of my ability to work in a team as well as individual. I hereby declare that the information furnished above is true to the best of my knowledge.