# **Neha**

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**Career Objective**

## A challenging and performance oriented post with the scope for professional development as well as attractive prospect in your progressive organization to broaden my horizon for a successful career.

**Strengths**

1. Willing to learn or train in new skills, accept challenges
2. Firm believer in initiative, integrity, loyalty and teamwork
3. Ability to handle multiple tasks, strong communication & organization skills
4. Ready to adapt to changes with a positive attitude

**Professional Experience**

**T&F Tax and Finance Group, DIFC, Dubai (renamed as W.T.A)** (February 2013 – Present)

## *Client Relationship Officer – Fiduciary*

1. T&F Group is a leading provider of international tax consultancy and trust services to corporate groups, businesses, entrepreneurs, expatriates, private individuals and families. T&F Group is a client focused international organization, aiming to understand, assess, design and implement solutions that best fit the needs of a demanding clientele operating in highly complex fiscal, legal and financial environments
2. Supporting HNW clients in all aspects of Processing Requests, Responding to Queries, Setting Up Structures – Offshores/FZE’S in UAE (acquiring Visa’s), Bank Account Openings and Management (local and international)
3. Project Manager on several internal projects (Ex. Corner Card, Yes money Card)
4. Handling Compliance matters (completing required due diligence on clients)
5. Managing corporate free zone companies (set-up in different international jurisdictions)
6. Responsible for Client Relationship, Management & Retention
7. Dealing with requirements of different authorities to set up structures
8. To recommend, develop and implement solutions to increase efficiency, improve productivity, enhance service levels, enhance process and improve overall department delivery

**Suisse Capital AMC, Dubai** (December 2011 – January 2013)

## *Sr. Service Manager – Banc assurance*

1. Managing Service unit of 12 team members
2. Supporting HNW clients in all aspects of Processing Requests, Responding to Queries, A/c Openings & Resolving Post Sales Customer Issues
3. Liaise with the financial provider’s companies for policy issuance, negotiate and agree on pricing/rate and MIS reconciliation
4. Managing adequate training and programs are devised and implemented to train sales team effectively in product, policy, selling skills and compliance related guidelines
5. Assisting in Company Formations (Offshore/FZE in UAE)
6. To ensure customer documentation is complete & in compliance with the bank’s requirements to ensure free straight through processing
7. Prepare monthly MIS for the Sales targets achieved by RM’s & Service Quality Report to ensure error free process
8. Manage Quality Targets, Incentives & Annual Performance Appraisal

**White Feather Consultancy, Dubai** (May 2011-October 2011)

***Human Resourcing and Development Assistant (Temporary Contract – 6 months)***

1. Handled all UAE National recruitment process
2. Checking CV’s and forwarding them to HR Manager for review
3. Call candidates for Interview
4. Testing Candidates
5. Complete People Soft Personal Data
6. Preparing Code of Contract
7. Ensuring file contains all documentation before first working day
8. Administration job

**TNS Market Research Agency, Dubai** (2008-2010)

## *Management Trainee (Worked on 3 months Contractual basis during these years)*

1. Updated and organized their cliental detail
2. Make verification calls to respondents to check accuracy of data collected
3. Collected first hand data from suitable respondents
4. Communicated with clients which involved business men to housewives

**Key Management Skills**

1. Staff Management Training
2. Cross Cultural Communication
3. Client Relationship Management
4. A well organized, reliable and self-motivated person
5. Strong leadership skills and ability to manage people effectively
6. Achieve Customer Satisfaction scores as per laid down standards
7. Has the ability to understand customer needs
8. Able to get along very well with all staff
9. Identify staff skills/knowledge gap and plan their development

**Area of Expertise**

1. Policy & Procedure Development
2. Client Service Management
3. MIS Reports and Analysis

**Computers & Training**

**Office Productivity Support**

1. Proficient in Business Information Systems, Microsoft Office (Word, Excel and PowerPoint) and various banking operation systems
2. Knowledge of Bloomberg

**Training Courses**

1. Service Delivery & Standards
2. Foundation Course for Authorized Financial Consultant
3. Supervisory skills
4. Delivering Wealth Management Sales
5. Customer First Seminar

## Education

Sept’11-June’13  **Institute of Management Technology, Dubai**

Master of Business Administration

(International Banking and Finance)

June’08-April’11 **BKMIBA, HLBBA, Ahmadabad, Gujarat**

Bachelor of Business Administration

(Adv. Financial & Marketing Management)

**Personal Details**

1. Nationality : Indian
2. Linguistic Abilities : English, Hindi, Arabic (elementary)