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**Financial Advisory - Professional**

Professional with entrepreneurial traits, extrovert and diligence with **over 11 years** of extensive experience in financial services/wealth management industry with expertise on Business Development, Financial Consulting, Customer Management and Product Launches.

Proficient in flourishing business through pioneering & judicious strategies, improvising Client Management skills, Optimizing Productivity and Effectual People Management competence

*Product Expertise:*

* All Investments cum Leveraging avenues like Direct Equity, Mutual Funds, Bonds, Life Insurance, General Insurance, PMS, Private Equity Funds, Derivatives, Gold, REIT Funds.
* Conversant with banking products, funding requirements, funding appraisals like Term Loan, Project Financing, Equipment financing, Working Capital etc.

**PROFESSIONAL EXPERIENCE**

**ICICI Bank -*Nov 2012 – Oct 2013***

**Relationship Manager**

**KEY RESPONSIBILITIES**

* Responsible for business development across diverse financial products & services
* End 2 End financial solution including Loans, Remittances & Real Estate services.
* Responsible for management of 150 ultra HNI clients with a combined net worth of 450 million.
* One point of contact for all customer escalations.

**KEY ACHIEVEMENTS**

* Fresh Mutual Fund business to the tune of Rs.100 million in a short span of 6 months.
* Consistently meeting the revenue target every quarter irrespective of market conditions.

**Past Experience – In Brief**

**December 2008 – November 2012NESTO Financial Consultants Pvt Ltd**

**Relationship Manager –Financial Services**

**KEY RESPONSIBILITIES**

* Responsible for business development in Mutual Funds and PMS.
* Managing asset allocation and ensuring higher returns for the clients by advising the portfolio across different asset classes
* Responsible for customer management and customer escalations.
* Recruitment, Training and Mentoring of new resources
* Periodic tracking, reporting and advising on fund performance with the customers
* Recommend and modify investment strategies in consultation with clients to unify their goals and returns.
* Responsible for Recruitment, Training of employees.

**KEY ACHIEVEMENTS**

* Customer basegrown by 25 % CAGRin 4 years.
* Corpus grown by 30 % CAGR relatively

**March 2004 – Nov 2008 ING VYSYA BANK LTD**

**Senior Relationship Manager – Wealth**

**KEY RESPONSIBILITIES**

* Administering Investment portfolio of Ultra HNI Banking customers and rendering advisory services on maximizing wealth, by diversifying the portfolio across different asset classes.
* Advisory on Investments across Direct Equity, Mutual Funds, PMS, Private Equity Funds, REIT Funds, Call and Money Market Instruments, Bonds & Derivative portfolio.
* Responsible for meeting customer requirements through customization of banking needs thereby ensuring growth in CASA balances and maintains relationship.
* Identifying and bridging gaps of customer’ needs by effectually serving as an Interface between Bank and Customer.
* Liaise with Central Processing Desk; ensure Customer Relationship management is maintained by resolving potential problems subject to Audit and compliance.
* Responsible for Branch Income Targets.

**KEY ACHIEVEMENTS**

* Mutual fund sales increased by over 20%
* Improved client management resulted in new HNI clients through references.
* Exceeded branch income targets in all the years.
* Business spread overdiverse segments of mutual funds and direct equity to Bonds, ETFs etc.

**June 2001 – Feb 2004 BLUECHIP CORPORATE INVESTMENT CENTRE**

**Assistant Branch Manager – Wealth**

**KEY RESPONSIBILITIES**

* Dealt with avenues like Mutual Funds, Insurance, Bonds and Govt Securities.
* To Prepare, Maintain, Review, and Analyze the Portfolio of the clients.
* Daily monitoring of client inflow/outflow transactions. Assist with reporting of monthly fresh and lost business.
* Identify the Gap in customer trends and propose for resolutions
* Correct, manage and communicate exceptions from clients.

*Professional Certificates:*

Certified Mutual Fund Advisor by Association of Mutual Funds of India (AMFI),

Certified Insurance Advisor by Insurance Regulatory and Development Authority (IRDA)

# *Academic Qualifications*:

1998 – 2001 Bachelor of Science (Bio – Chemistry) from Bharathidasan College of Arts and Science, Erode, Tamil Nadu, India.

2012 – Pursuing Post Graduate Diploma in Business Administration (PGDBA) in Marketing & Finance from Symbiosis, Pune, India

*Personal Details*:

Date of Birth : 06th April, 1980

Languages Known : English and Tamil

Marital Status : Married

Nationality : Indian