



ABOUT ME

*Efficiency,
Efficacy,
Effectiveness*

Date of Birth: May 8, 1997
Gender: Female

Address: Kondhwa, Pune
Nationality: Indian

CERTIFICATIONS

- IBM Mastery Certificate (Trained from IBM 2019)
- HOD appreciation - 2019
- Certificate of appreciation in Dec - 2019
- Qualify for bronze level - 2019

EDUCATION

MBA: Master of Business Administration in finance and Marketing (Dual Specialization) - 65.33% Fergusson College - Pune

B.COM – Bachelor in Commerce Saurashtra University, Rajkot - 67%

HSC - Dholakiya school, Rajkot - 79.48 %

SSC - Dholakiya School, Rajkot - 67.80 %

CONTACT



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LANGUAGES

English (Proficiency) Hindi (Native)
Marathi (Basic) Gujarati (Native)

HOBBIES



Art & Craft



Swimming



Dancing



Music



Traveling

VIDHI SHAH

MBA Graduate & Senior Relationship Manager

CAREER OBJECTIVE

To work in challenging environment for a progressive organization that would leverage my technical experience to the fullest potential, align my growth with the growth of the organization and zeal to keep learning in fast paced changing

EXPERIENCE:

➤ ACCOUNT EXECUTIVE – Kumar Properties (Nov'20 – Present)

- Ensuring accuracy and timelines in Accounting and all the records BRS, Debtors, sales, inventory. Achieved zero percent reversal document
- Demand Letter Generation and Schedule update of each slab of clients
- Preparing accurate MIS Report of vendors, suppliers, bank statement.
- Reconciliation of vendors and Bank Account every month.
- Processing all vendor payments of contractor, employees and suppliers.
- Creating Receipts with GST and Agreement.
- GST Payment/ returns on monthly bases.
- Monthly Data analysis & report creation.
- Find solutions to any problems & try to solve it.
- Microsoft Office & Excel.
- Successfully completed IBM with MBA.

➤ SENIOR RELATIONSHIP MANAGER - Bajaj Allianz Life Insurance (Jun'19 – Oct'20)

- Analyzing investment requirements of clients and providing relevant solutions
- Responsible for managing a key relationship of a very reputed and demanding NBFCs
- Responsible for managing overall business for Assigned (5-6 branches) which involves business development, sales, relationship management, operational and training support, identifying new business opportunities and meeting overall target assigned on new business
- Coordinating with promoters and conducting BTL activities at corporate
- Responsible to drive business generation initiative to achieve monthly, Quarterly & Yearly business targets along with assigned team.
- Resolving customer service issues by coordinating with internal team.
- Drive to excel & exceed expectations with good comprehension of Finance Market
- Updating database of the existing clients and new clients on a regular basis.
- Supporting the Operational Management team in maximizing customer base.
- Defining & Providing marketing ideas to stakeholders.
- Hands on experience of Life Insurance & policies.
- Good understanding of Investment schemes.

EXPERTISE

Advance Excel ●●●●●
Tally ERP 9 ●●●●●
Project Management ●●●●●
Negotiating Skills MS ●●●●●
Word ●●●●●

SKILLS

Attentive listening and effective oral communication skills Problem Solving ●●●●●
Leadership Skills ●●●●●
Critical Thinker & Time Management Ability to quickly create apply ideas and solutions ●●●●●

I hereby declare, that all the above information is true to best of my knowledge.

PLACE – PUNE

VIDHI SHAH

