





SHUBHAM KHEDKAR

DEPUTY MANAGER

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PROFILE

Focused Professional with proven knowledge of investment management, risk management, and asset management. My experience helped me develop financial sales process and risk profiling. I am highly motivated to continue learning and improving my skills

LANGUAGES

English, Marathi, Hindi.

SKILLS

Project Management



Problem Solving



MS Excel- Advance



Leadership



WORK EXPERIENCE

KOTAK MAHINDRA BANK LIMITED

July 2022-Present

Deputy Manager- M2 Grade Branch Banking

- Managing portfolio of ongoing clients ranging from Retail to HNI Ultra HNI and NRI with portfolio evolution for future goals.
- Handling Saving, Current account, Investment Portfolios and Business diversification includes activation of existing inactive customers by creating needs of various financial avenues and cross selling other products (i.e. MF/Tax planning/FD/ Bonds/LI/GI/Loans/CMS/) as per customer requirements.
- Building positive relation with clients and promote high quality service, sales process and also financial process
- Updating the MIS and preparing necessary report, also handling remittance of Companies.
- Handling service staffs customer and doing meeting with them for customers financial planning and profiling
- Handling escalation and provide solution to customer within defined TAT.
- Co-ordinating with the various department to solve customer's query.
- Meeting the target that are set in various products which help in to achieve organization goal.

ICICI SECURITIES LIMITED

June 2021 -July 2022

Assistant Manager- S3 Grade

- Managing portfolio of ongoing clients ranging from Retail to HNI and NRI with portfolio evolution for future goals.
- Handling Trading, Demat account and Business diversification includes activation of existing inactive customers by creating needs of various financial avenues and cross selling other products (i.e. MF/Tax planning/FD/ Bonds/LI/GI) as per customer requirements.
- Building positive relation with clients and promote high quality service and sales process.
- Updating the MIS and preparing necessary report.
- Handling Team of 3 RM's and train them.
- Handling escalation and provide solution to customer within defined TAT.
- Co-ordinating with the various department to solve customer's query.
- Meeting the target that are set in various products which help in to achieve organization goal.

HCL TECHNOLOGY

INTERNSHIP

June 2021 - July 2021

- Creating organic reach on different social networks such as Facebook, WhatsApp, and Instagram through stories and curated posts for our program
- Sharing program's curated posts on social networks
- Inviting students and spreading awareness about HCL Tech Bee program's mass counseling session (webinars) in the respective city/town
- Establish student-level connect/representation in every college/coaching groups in each targeted districts
- Creating program as a center of discussion in topics like 'career after 12th class' and 'IT as a career'

RELATTA TECHNOLOGY

May 2021 - June 2021

INTERNSHIP

- Creating strategies to increase online traffic to the organization's website.
- Taking care of everything from SEO, SEM to Social Media Marketing
- Creating Social Media Marketing strategies to create a brand name in Social Media and raise awareness

EDUCATION HISTORY

SIES College Of Management Studies And Research, Navi Mumbai - Masters in Business Administration- Marketing - 2019-2021	3.41/4.33
Sinhgad Science College,Pune - BACHELOR OF BUSINESS ADMINISTRATION - 2015-2018	58.25%
SIR PARASHURAMBHAU COLLEGE, PUNE - Maharashtra State Board of Secondary and Higher Secondary XII(HSC) - 2015	49.38%
Champavati Vidyalaya, Beed - Maharashtra State Board of Secondary and Higher Secondary X(SSC) - 2013	79.40%

PROJECTS

- Study,analysis & development of strategies for marketing of traditional products In villages
 - Consumer behavior ready for transformation, moving to digital commerce over offline post lockdown
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1st June- 31st Aug

15April - 31st June

ACHIEVEMENTS & AWARDS

- Promoted from SIV to M-I within six months.
 - Award in Life Insurance Contest at Regional Level (August 2021, December 2021).
 - Award in Life Insurance Contest at Zonal Level (January 2022, February 2022).
 - Award in Life Insurance Contest at International Level (Iceland) (JAN-FEB-MRCH 2022)
 - Award in General Insurance Contest for Domestic tour (Feb - Mar 2022)
 - Award in Top Sop in Clusters (July-Sept 2022)
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CO-CURRICULAR AND EXTRA-CURRICULAR ACTIVITIES

- Member of Student council at SIES College of Management Studies.
 - Member of the Social Media Committee at SIES College of Management Studies
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CERTIFICATION PROGRAM

- CRTIFICATION PROGRAM IRDA Certification program (2021).
 - NISM VA Mutual fund distributor (2021).
 - Awareness of Business, Customers And Competition 2020
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