

YOGESH ASHOK SHINDE

✉ shindey198@gmail.com 📞 9673709909 📍 Pune

SUMMARY

Dedicated Associate with experience working in fast-paced environments with diverse groups of individuals. Collaborative executive administrative team member with organizational skills, attention to detail and experience in MNC office environments. Delivers accurate, error-free work meeting strict standards. Always ready to take on challenging assignments, help others and exceed expectations. My Skills and Experience While Providing Opportunities to Integrate Personal with Professional Goals.

SKILLS

- MS Excel, Pivot Table, VLOOKUP, Hlookup, Multitasking
- Tally ERP 9 Certification Done With A Grade
- MS-CIT Certification Done With A Grade
- Linux, CCNA, N+, MCSA Certification Done.
- Prioritization and time management
- Customer interaction
- Operations management
- Data confidentiality
- Database maintenance

EXPERIENCE

Associate

EXL SERVICE COMPANY INDIA PVT LTD *May 2022 - Present*

- Client's Requirement And Resolve There Queries.
- Ensure Timely Processing Of Customer Utility Billings.
- Research Utility Account Transactions To Respond To Customer
- Inquiries Regarding Bills.
- Working On Salesforce Software For Billing Process.
- Handling Kaluza Analysis Software For Billing Process.
- Doing Day To Day Activities.
- Helping Customers In Case Of Complaints And Questions.
- Managing New Contracts And Sales.
- Assisting Customers In Account Reconciliation.
- Maintain System Controls And Information For File Maintenance.
- Analyzed and developed technical and functional specifications.
- Assessed customer needs and modified existing databases to meet specified client requirements.
- Managed all payment processing, invoicing and collections tasks.
- Verified proper setup and tracking of billing accounts according to client requirements.
- Managed highly organized document filing system for account records, maintaining stringent data security

Operations Associate

JRS WEALTH *Jul 2021 - May 2022*

- Mutual Fund Portal Handle.
- Daily Reports Preparation.
- Back Office Service Provision.

- Investor's Bank Reconciliations.
- Investor's Monthly Mutual Funds Reports Preparation.
- Process Client Redemptions Out of Funds.
- Process Capital Calls From Client Accounts To The Funds.
- Income Tax Return Filling
- Monthly Reporting And Coordination.
- Management Of Market Transactions Including The Processing Of
- Managed Fund Applications.
- Vendor Management.
- Developed models, reports and visualization solutions to interpret and evaluate investment data and processes.
- Reviewed monthly key performance metrics to continually meet investment goals.
- Kept up-to-date on latest market trends and investment opportunities through in-depth research and information from contacts.

Operations Associate

M-VITAMMIN INVESTMENT SOLUTION *Oct 2016 - Jul 2021*

- Preparation of Financial Presentation And Management Reporting, Packs For BU Leadership Team.
- Maintain relations with Funds as pertains to Operations, i.e. Fund launches - Provide premier operational services to high profile FAs.
- Mutual Fund Process Handling
- Investment Banking Process Handling.
- Health And Life Insurance Operation Process Handling.
- All Life Insurance And Health Insurance Portal Handle.
- Wealth magic Software Handle For Client Portfolios.
- Client Relationship Management And Customer Services Related To Retail Banking Operations.
- Responsible For Cash And Customer Transactions Review reports like End of day (EOD) cash position report, Instruments issued etc
- Created Plan To Streamline Onboarding And Operational Support For Client.
- Assisted management in making key decisions by collecting, organizing and modelling data.
- Collaborated with company legal counsel to review and revise contracts and address compliance issues.

EDUCATION

Master in Commerce

B.R. College Of Commerce, affiliated to Pune University, 2017 batch *2015 - 2017*

Bachelor in Commerce

B.R. College Of Commerce, affiliated to Pune University, 2015 batch *2012 - 2015*

PERSONAL DETAILS

- Date of Birth : 5th March 1994
- Sex : Male
- Marital Status : Married
- Nationality : Indian
- Language Proficiency : English, Marathi & Hindi
- Hobbies : Playing Cricket, Travelling, Swimming, Reading Books, Playing Cricket
- Strengths : Self Confident, Innovative, Multitasking.
- Address : Sr No 244/2, Flat No 2 Vanita Villa Apart, New DP Road, Near Medipoint Hospital, Aundh/Baner, Pune - 411007

LANGUAGES

Marathi
Hindi

English

AWARDS

Awarded With Gold Coin And Trophy For Best Performance At M-Vitamin Investment Solution

Awarded With Medal And Trophy For Best Employee Of The Year At M- Vitamin Investment Solution

DECLARATION

I hereby declare that the above-mentioned information is correct up to my knowledge and I bear the responsibility for the correctness of the above-mentioned particulars.

Place : Pune

Date :

(Yogesh Ashok Shinde)