KRUPA VORA

SUMMARY
Enthusiastic finance graduate with experience of basic of finance. I possess proficient knowledge in statistics, mathematics, and analytics. Excellent understanding of business operations and analytics tools for effective analyses of data, Looking to leverage my expertise towards an esteemed organization and grow together

CONTACT

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Certifications Undertaken
NISM 8 – Derivatives
NISM VA – Mutual Fund Distributor
NISM XA – Investment Advisory Level 1
Certified Financial Guardian
CFP Certifications

- Investment Planning
- Retirement planning
- Risk Analysis & Insurance Planning

SKILLS

- Leadership and Team Management.
- Organization and Time Management.
- The ability to analyze, model and interpret data.
- Problem-solving skills.
- Product Management
- Customer Relationship Building
- Client Account Management
- Outstanding Customer Service
- Regulatory requirements understanding
- Customer Interaction
- Team working skills.

QUALIFICATION
International College of Financial Planning
MBA- Financial Planning
2015-2017

Nagindas Khandwala College of commerce –(NL)
BFM-Bachelor of Commerce in Financial Market
2011-2014

WORK EXPERIENCE

Kotak Mahindra Bank(Deputy Manager)
Employment Term : 1st Aug 2019-15th Feb 2022

- Serving as assigned person to welcome the customer, direct them as appropriate based on their identified needs.
- Maintained positive, professional working environment to optimise staff and customer satisfaction.
- Responsible for servicing any walk-in customers of the bank irrespective of the segment/mapping Maximized client experience by proactive sharing markets updates, trend and intelligence.
- Regular generation of leads for customer and providing a Financial Planning Services to the customer.
- Branch Operations, Cash Handling, Fund Transfer, NEFT and Outward Clearing are some of the popular skills required to work as a SDO.
- Provide account opening service forms and taking request from customer
- Increased the wallet share with the customer by constantly exploring opportunities to cross sell other products offered by the bank.
- Listened to team members' feedback and proactively addressed concerns.
- Supervised and mentored junior team members, providing detailed instructions and guidance to maximize team efficiency.

Quantum Mutual Fund(Relationship officer)
Employment Term: 2nd May 2016 – 31st May 2018

- Reviewed and assessed client credit and investment history.
- Resolved customer queries and achieve customer delight. calls on a rotating basis, operating telephone equipment, automatic dialing systems, and different telecommunications technologies.
- Responsible for Business Development activities that involved New Client Acquisition through our Campaign Lead Based.
- Creating and Maintaining a Healthy Professional.
- Relationship with Clients and providing necessary services. Client that has manpower requirements.
- Providing a good Financial Planning Services keeping mind1.objective 2.Risk Appetite 3.Time Horizon4.Goal
- Advised present or prospective clients by answering incoming
- Planned and led client events, including product information seminars.
- Provided regular market and product feedback to improve services offered.
- Built and maintained existing customer relationships, acting as a trusted advisor regarding a variety of banking activities.
- Contacted existing customers and informed them of new product offerings