

NEERAJ SINGH

Phone: 9161400005 ; Email: nsingh.vns@gmail.com.

WEALTH MANAGER

Strong track record of exceeding performance benchmarks throughout the career span of **9+ years** and seeking senior managerial level assignments across the industry.

PROFILE

- Career graph of **nearly 9+ Years** predominantly in steering Wealth Management and Business Development, Market Analysis, Training with renowned business organizations, currently spearheading as Sr. Wealth Manager with **Value Wealth Creator**.
- Responsible for identifying potential client and working with them to build a relationship with the goal of managing their wealth.
- Researched Industry and market trends, especially within our member audience base, to deliver relevant and compelling information that inform product strategy.
- Conducted Financial market research through analysis economy factors, new trends and potential investment opportunities, reported to senior management.
- An all-rounder intellect blending leadership skills with sound business practices to **achieve turn around growth and position organization for long-term profitability**; expert in creating sophisticated sales model for **consistent business growth**

KEY COMPETENCIES

Financial Services
Investment Products
Team Management
Business Development
Regulatory Compliance

Client Relationship Development
Creative Investing
Key Accounts Management
Sales Consulting
Market Analysis

PROFESSIONAL EXPERIENCE

Value Wealth Creator
Sr. Wealth Manager

April 2023- Present

Wealth Ventures
Wealth Manager

July 2020-March 2023

Motilal Oswal Financial Services Limited.
Assistant Manager

August 2018-June 2020

Saurabh Cooling Corporation
Sales manager

APRIL 2015-July 2018

OSO Sun Power Pvt. Ltd.
Area Sales Manager

JAN 2014 – MAR 2015

- Supporting the development and implementation of each product strategy and assisted with the preparation of business plan documents and presentation
- Partner with marketing to develop a short and long term growth strategy and tactics needed to execute on these priorities
- Contributed ideas for new products and formula improvement across all categories along with helping to prepare concepts, briefs and presentations for teams
- Enabled executive leadership decision making through development and presentation of metrics and insights areas of operation, delivery, finance, and business.
- Anticipate client issues with regards to calls, maturities, change of investment objectives and behavior that can result in compliance or regulatory concern
- Identify the client requirement and advise them the appropriate investment plan.
- Worked with new and existing clients in building their portfolio by assessing their investment objectives, risk tolerance, time horizon and unique circumstances.
- Ensured compliance with company and regulatory requirements and guidelines.
- Conduct in-depth review of client's financial circumstances and future goal.
- Achieved client satisfaction and loyalty through excellent service.
- Forecasting product requirement by analyzing market and competitors regularly aiming at achieving best possible revenues for diverse product line; managing retails as well as key accounts
- Managing the team in the region, imparting training to in-house teams as well as the sale teams at dealer's end to enhance overall efficiency and productivity in terms of sales turnover.
- Developing new profitable business partners from main competition vendors, analyze latest market trends, track competitor's activities and provide valuable inputs for fine tuning sales & marketing strategies
- Analyzed competition and market information and offered feedback to product team about the model & pricing requirement and enable fine-tuning of overall strategies to achieve consistent profitability

EDUCATIONAL CREDENTIALS

MBA in Marketing

Sikkim Manipal
University

Bachelor of Commerce

V.B.S. Purvanchal University

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| Address: | Handewadi, Pune |
| References: | Available on Request |