

RESUME

PERSONAL PROFILE

NAME: DIVYA RAWAL

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ADDRESS: Charni Road, Mumbai

OBJECTIVE

TO WORK IN LEARNING AND CHALLENGING ENVIRONMENT BY UTILIZING MY SKILLS AND KNOWLEDGE TO BE THE BEST OF MY ABILITIES AND CONTRIBUTE POSITIVELY TO MY PERSONAL GROWTH AS WELL AS GROWTH OF THE ORGANIZATION.

EDUCATIONAL BACKGROUND

- SSC EXAM WITH 81.60%
- HSC EXAM WITH 80.62%
- GRADUATION WITH 8.78 CGPI
- CERTIFICATION IN TALLY WITH GST WITH 87%
- PURSUING CFP (CERTIFIED FINANCIAL PLANNER)
(Risk and Estate Planning module completed)

SKILLS

- Communication skills
- Attention to details
- Consistently meeting customer's expectations
- Time Management
- Quick Learner
- Good retention skills
- Emotional Intelligence
- Customer relationship manager
- Financial Analysis

EXPERIENCE

➤ ***SBICAP Securities (Lower Parel) [SEPTEMBER,2023 – MARCH,2024]***

CUSTOMER SUPPORT OFFICER

- Providing solutions of Demat and Trading related queries through calls and mails.
- Handle complaints and provide appropriate solutions according to the situation.
- Helping clients regarding Process and Charges to open Demat account.
- Guide new customers how to place order for Trading and Mutual funds.
- Provide status of order placed, limits available to trade, order rejection, SIP Status.
- Coordinating with respective department to provide end resolution within time limits.
- Assist with mandate creation for SIP and applying for IPO and NFO.
- Coordinating with Logistics for Dispatch of DIS Booklet and CML Copy.

➤ ***Varsha Investments (Opera House) [MAY,2024 – NOVEMBER,2024]***

CUSTOMER ACCOUNT MANAGER

- Prepare presentation explaining customers about risk profiling, portfolio strategy and asset allocation.
- Provide research analysis to internal sales team about present important information about schemes, markets and economy.
- Handling clients queries to enhance relationship
- Prepare weekly market performance data using Morningstar AWS software and cover news, market data and economic calendar
- Guide clients throughout the investment process

Reference will be provided upon request.