

SHIVA SHARMA

WEALTH RELATIONSHIP MANAGER
















+91-8741095120 shiva.shivasharma32@gmail.com ALWAR

CAREER OBJECTIVE

Exploring an opportunity to work with reputed organization where I can contribute my experience, skill set and knowledge.

CAREER SUMMARY

Overall 8+ Years rich experience in Sales & Operations management to achieve sales target, customer service, training of on-role and off-role employee, recruitment, collection, administrations, facilities management, security management and MIS Reporting.

 Sales	 Team Handling	 Recruitment
 Customer Service Handling	 Data & Report Management	 Collection
 MS-Office, Excel & CRM	 Relationship Management	 Grievance Handling
 Business Administration	 TRAINING	 Mail Handling
 Administrations Management	 Facility Management	 Tele sales

WORK EXPERIENCE

Wealth relationship manager

Nov 2023 – till date

ICICI BANK LTD

Alwar -Rajasthan

Roles & Responsibility:

- Cultivated and maintained strong relationships with high- net-worth clients to understand their financial needs and goals.
- Provided personalized financial advice and solutions to clients, including investment options, loan products, and wealth management services.
- Achieved and exceeded sales targets by identifying new business opportunities, upselling bank products, and expanding the client base.
- Managed and monitored client portfolios, conducted periodic reviews, and recommended adjustments to ensure alignment with their financial objectives.
- Assessed the risk profile of clients through comprehensive analysis of their financial situations and recommended appropriate risk management strategies.
- Ensured compliance with banking regulations, policies, and procedures while adhering to Know Your Customer (KYC) and Anti-Money Laundering (AML) guidelines.

- Maintained up-to-date knowledge of banking products, investment instruments, and market trends to provide informed advice to clients
- Delivered exceptional customer service by promptly addressing client inquiries, resolving issues, and providing timely support.
- Prepared and maintained accurate documentation, reports, and client records to ensure transparency and facilitate efficient decision-making.

SENIOR CUSTOMER SERVICE EXECUTIVE Aug 2020 to Nov2023

Max Life Insurance Company Ltd. Alwar - Rajasthan

Roles & Responsibility:

- New case login and existing insurance policy amendment/rectification supports to customers
- Processing of received cheque against new/renewal policies booked by agents or customers,
- Recruitment
- Reconciling and maintaining daily account books,
- Handling cheque payment bounce and expediting with relevant agents or customers to arrange collections,
- Managing day-to-day office administration activities along with indent stocks and stationary issuance,
- Tracking deliverable and communicating with customers for collection of Insurance bonds / premium receipts
- Vendor negotiations for bulk buying and invoice verification to process payments on-time,
- Organizing medical examinations schedules and lab arrangements,
- Avoiding policy cancellation and surrender cases by resolving customer complaints,
- Generating referral business leads for team and branch level business,
- MIS Updating and data collections for immediate support to Branch Head including other assigned tasks.

Senior Loan & Finance Officer Feb'2020 – Jun'2020

My loan care Ventures Pvt. Ltd. Gurgaon, Haryana – India

Cadre Apr'2019 – Feb'2020

Indialends.com Gurgaon, Haryana – India.

Associate Sales & Marketing May'2017 – Mar'2019

**Paisa bazaar Marketing and Consulting Private Limited Gurgaon,
Haryana – India.**

Roles& Responsibility:

- Fully responsible for meeting and exceeding targets as assigned periodically
- Reaching productivity that meets job standards, while working with speed and accuracy
- Flexible, able to shift priorities to accommodate changing demands.
- Ensure no losses or errors occurred while assisting customers
- Work towards ensuring zero cases of mis-selling / fraud in the processes
- Responding in a timely and effective manner to all internal communication.
- Adheres to and supports company policies and practices
- Loan products sales & marketing campaigns and business lead generations,
- Verification documents collections and helping customers to reduce processing turn around- time.

EDUCATION & TRAINING QUALIFICATION

2017- Masters in Arts (Sociology) Post graduation from RajasthanUniversity, India.

2014 - Bachelors in Arts - Graduation from Rajasthan University, india

2010 - Senior Secondary Board (12th) Arts CBSE, Neemuch – M.P, India.

2008 - Secondary Board (10th) - CBSE , Ajmer – Rajasthan, India.

Strengths & Capabilities:

- Ability to handle independent executions,
- Adaptability to work in any work environment,
- Excellent communications, presentations, inter-personnel skills,
- Decision maker, resourceful, and ability to work under pressure and perform according to management demand,

Personal Details:

- Date & Place of Birth- 20th Feb'1993, born in Alwar – Rajasthan, India
- Marital Status - Married
- Gender - Male
- Language Known - Hindi& English (Read, Write, Speak)