

SACHIN SHEWALE

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Personal Statement

An honest and trustworthy professional with Eight years experience in Banking Operations, Sales and Relationship Management, Anti-Money laundering, Know Your Customer.

Certifications: -

- NISM-Series-V-A: Mutual Fund Distributors Certification Examination
- IRDA- Life insurance Certification Examination

Key Skills

- Client Servicing, Sales Management, Relationship Management.
- Understanding the needs of client.
- Knowledge of AML, KYC.
- In-depth Knowledge of CASA, Term Deposit.
- Revenue Generation by selling third party products.
- Understanding of Credit card, Debit Card, Insurance, Mutual Fund.
- Tax Planning.
- HNI and Wealth Management.
- Remittance (Inward and Outward).
- Mutual Fund (Indexation benefits, Tax benefits).

Employment History

- **Manager at Axis Bank Ltd**
- **(31st August 2021 To till date)**
- Roles and Responsibilities, Team handling
- Checking account opening documents as per KYC
- Transaction monitoring as per AML guidelines
- Client Service Delivery & Operations management
- Audit & Compliance.
- **Sales generation - CASA & Third-Party Wealth Products.**

- **Deputy Manager Scale-II at ICICI Bank Ltd**
- **(December 2016 to 30st August 2021)**
- Roles and Responsibilities:
- Checking account opening documents as per KYC
- Transaction monitoring as per AML guidelines
- Client Service Delivery & Operations management
- Audit & Compliance.

- **Sales generation - CASA & Third-Party Wealth Products.**

- **Agency development Manager at Max Life Insurance Ltd, Pune**
(24August 2015 to 30th October 2016)
- Roles and Responsibilities:
 - Responsible for adding new clients for our organization.
 - Hiring New agent and Generate New life insurance business.

- **Associate Sales Manager at IndusInd Bank Ltd, Pune**
(27Jan 2014 to 13 August 2015)
- Roles and Responsibilities:
 - Responsible for adding new clients for our organization.
 - Sourcing savings account (Resident and Non-Resident) and current account (Individual, Proprietorship, Partnership, Private Ltd TASC).
 - Upgradation of variant of Saving account, Debit Card, Credit Card.
 - Selling of all kind of loans (Business Loan, Personal loan, HL, LAP)
 - Ensuring service excellence to client to enhance portfolio, control retention and better cross sell.
 - Providing advisory services to corporate & high net-worth customers on funds management while maintaining relationship with Key.
 - Responsible for providing different tax saving plans to our client base.

- **Senior Sales Officer at Hdfc Bank Ltd, Pune**
(1June 2011 to 30 August 2013)
- Acquisition of high CASA values and Term deposit.
- Generating revenue by selling Life Insurance, Mutual Fund, Credit card, Debit Card, Health Insurance, General Insurance, Demat A/c)
- Identifies and pursues opportunities to cross sell products and services to existing clients, through regular telephone or face to face contact and on-going relationship building.

Education

Degree/Class	College/ University	Year	Class
B.Com	Maharashtra	2007	Second class
12 th	Maharashtra	2004	Second class
10 th	Maharashtra	2002	Second class

Achievements

- High and consistent Focus Score (Customer feedback score).
- Received certificate of appreciation for doing highest life insurance business in ROMG In February month of year 2019.
- Received certificate of appreciation for achieving the 3rd highest target in Mutual Fund business in March month of year 2020 .
- Got promotion in the year 2021 from Deputy Manager Scale-I to Deputy Manager Scale –II.

Personal Information

NATIONALITY : Indian

LANGUAGES :English, Hindi,Marathi

DATE OF BIRTH:30thJune 1986

PRESENT ADDRESS:Shivtej Nagar plot no 654, sector no 18 chinchwad pune-411019.

Declaration

I have declare that all the above particulars are true to the best of my knowledge.

Place-Pune

Date-

Sign

Sachin Shewale