



- ⇒ More than 5 years of Retail Banking experience with award winning results.
- ⇒ Well-Developed relationship Management expertise that complements Business acquisition skills.
- ⇒ Broad knowledge of numerous financial instruments and complex investment scenarios.
- ⇒ Possess excellent interpersonal, communication and organizational skills with proven abilities in training & development, customer relationship management
- ⇒ IRDA certified person for insurance business
- ⇒ NiSM (AMFI) certified person to sell & advice for Mutual fund.

Passionate, Personable, Perceptive & Articulate

Employment Chronicle

HDFC BANK LTD - Beawar, March '14 - June '16

Personal Banker -Beawar- Dec '14 -June '16
Teller - Bhilwara/Beawar- Aug '14-Nov '14
Portfolio Relationship Manager - Bhilwara- Mar '14 - Aug '14

Key Accomplishment:-

- ➔ Building relationships with high net worth individuals, walk ins to maximize sales
- ➔ Ensuring the smooth running of basic banking transactions.
- ➔ Looking after the short term and long term funding requirements of business clients and individual customers.
- ➔ Advising clients on mortgages and raising loans.
- ➔ Answering any financial and banking queries. Analyzed various customer issues and provided appropriate resolution.
- ➔ Handling customer queries face to face, over the phone or via correspondence.
- ➔ Marketing new financial products or services, and administrated cross selling of all bank products and services.
- ➔ Analysing financial reports.
- ➔ Representing the bank within the local community.
- ➔ Opening new bank accounts for individuals and also companies.
- ➔ Responsible for cash management.

CONTRIBUTION NARRATIVE:

In each role took the time to understand what really drives business results then strategically refocused to deliver on goals. As Personal Banker And Portfolio Relationship Manager cultivated and managed the Portfolio size as ₹ 250 Million (25 Crore) And 400 Million (40 Crore). Wherein Personal Banker Portfolio I increased the Portfolio size 120 Million to 250 Million in a financial year, as well increased the Card and Mortgage sales by 60% & 38% from base handover. As well I handled Corporate Salary Relationship with Cement industries. In promote of Digitalization, increased online transaction by 98% customer growth and 200% use growth. Rewarded by Cluster Head for, "notable sales of loan and revenue generating products". With Revenue Target of ₹300 thousand per month achieved persistently

YES BANK LTD - Barmer, Dec'12 - Feb'14

Client Relationship Partner

With working in "Professional's Banks of India", its concept of Integrity, Pride, Credibility, Respect, Ownership, Professionalism, Innovation, Agility & Speed, developed my "Professional Entrepreneurship" skill. Subsequently its internal Learning & Development Program upgraded me with lots of Banking & Practice knowledge

Mainly Focused on High value Corporate business and their TD's, as well salary relationship with Crude Oil companies working in District area. After my Joining the Branch book size had done growth of more than ₹100 million from 10 million. Cultivated HNI & NRI customers and Increased notable fee revenue. Acknowledged by Cluster and Regional head personally

Key Accomplishment:-

- ➔ Adherence to productivity metrics and enhance branch business.
- ➔ New Customer Acquisition in terms of Current, Savings Account (CASA) and Term Deposits (TD).
- ➔ Undertaking drives of fee income initiatives by cross selling of 3rd party products.
- ➔ Growth and retention of Retail Banking liability book.
- ➔ Organizing its CSR activity "YES ! I am The CHANGE" with local Schools and large employee based commercial institutions.
- ➔ Sustainably achieved the allotted Core targets by Institutions and Seniors.

AXIS BANK LTD – Barmer, Oct'10 – Nov'12

Business Development Executive – Balotra, Oct '10 – Feb 11
Barmer - March '11- Nov '12

- ➔ New Customer Acquisition in terms of Current, Savings Account (CASA) and Term Deposits (TD).
- ➔ Fee revenue generation by Selling Life Insurance, General Insurance & Mutual Funds Products
- ➔ Maintain proper files/registers/documents/filing (CASA forms, 3rd party products).
- ➔ Ensuring the maintenance of FTNR
- ➔ Working closely with small and medium sized businesses
- ➔ Maintaining a professional image at all times.
- ➔ Representing the bank within the local community.
- ➔ Facilitated help for all customers in vase of any special services.
- ➔ Coordinate and regular interaction with Clients, and seeking recommendation for customer reference.

CONTRIBUTION NARRATIVE:

Working with Newly Open Branch is a really Challenging work. AXIS Bank , Barmer branch inaugurated in March 2011 and only I was a sales representative of Bank. While working I recognised at Country level for fabulous track of Sales and achieving targets. Also I learned business acquisition and relationship building with Government and bureaucrat. Successfully sourced business tie-up with local governing Bodies. Also made size of Branch in 1 years at ₹120 million. Awarded by country Sales Head, President-Distribution, Cluster head and Regional Head, for business performance and achieving sales targets in various Bank contest.

Summer Internship (Duration: 7 weeks)

Organization: CORPORATE BRIDGE, MUMBAI (www.corporatebridge.net)

Title: Feasibility, strategic marketing & Sales promotion of new training product “MIDAS-TOUCH”

Synopsis: Sales Promotion of Midas-Touch at Schools, Colleges, University Programmes, Corporate Offices & Companies.

Maintain existing and build new relationships with channel partners

Scholastics & Credentials

Bachelor of Business Administration (BBA) -2007-2010 | Maharshi Dayanand Saraswati University, Ajmer

AULA .1 .1 SPANISH LANGUAGE -2016 | Instituto Cervantes, Neuva Delhi (Run by Embassy of Spain and Spain Government)

IRDA |

NISM (AMFI) | 'NISM Series V-A

Highlights :-

- ⇒ Won the REFLEXES, Stock market Simulation game on University level
- ⇒ Participated in Workshop on ENTERPRENUERSHIP, Conducted by KALASHAM TECHNO-MANAGEMENT SERVICE in association with BITS-APPOGY, BITS –PILANI
- ⇒ Participated in Seminar conducted by AICTE, & IEM Lucknow on Subject with “GLOBAL ECONOMICS CRISES & IT'S IMPACT ON INDIAN ECONOMY” at Lucknow.
- ⇒ Won the DEBATE completion arranged by BANK OF INDIA.
- ⇒ Have took participated in many vocal & co-activities



Yogesh Vyas

Date:-

Place:-