

# Nitanshi Yadav

## Service & operations Professional

Detail-orientated and adept at making critical decisions and managing deadlines. Adaptable with extensive experience providing first-class results. Meets job demands and deadlines through work-ethic and dedication to quality. Passionate about delivering outstanding service.



✉ nitanshi21.yadav@gmail.com

☎ +91-7398424044

📍 Gurugram, India

🌐 [linkedin.com/in/nitanshi-yadav-58248a17a](https://www.linkedin.com/in/nitanshi-yadav-58248a17a)

## WORK EXPERIENCE

### Service & Operations Professional Ameriprise Financial Services, LLC

07/2021 - Present

#### Achievements/Tasks

- Responsible to accurately process Incoming and Outgoing account transfer service request after the verification of the client details.
- Correspond and coordinate with business partners at the Home Office in United States, to seek/follow up for missing/incomplete information pertaining to service requests to enable completion of such requests.
- Utilize various computer applications to review service requests and supporting documentation/paperwork and ensure availability of required information.
- Follow up with Advisors/stakeholders if additional information is required and approve requests that are in Good Order; reject not in good order service requests and provide rationale for such decision.
- Worked upon creating the checks and wire requests for requested cash and securities proceeds. Also, trained the new hires and provided support for escalated cases for timely completion transaction requests.

### Investment Manager FinEdge Advisory

12/2020 - 02/2021

#### Achievements/Tasks

- Creating Financial Plans for clients, managing clients' investment portfolios and conducting risk profiling tests to assess product suitability.

### Intern

#### NJ Group

05/2020 - 07/2020

#### Achievements/Tasks

- Support partner in E-Wealth account opening and data entry of client details in E-Forms system for opening of Trading & Demat A/C also helping partner in resolving any query in account opening.

## EDUCATION

### Master of Business Administration (Hons) - Finance Jaipuria Institute of Management, Ghaziabad

07/2019 - 08/2021

### Bachelor's Of Commerce

Isabella Thoburn College, Lucknow

07/2016 - 07/2019

### 12th C.B.S.E

Central Academy Indira Nagar, Lucknow

04/2015 - 06/2016

### 10th C.B.S.E

Canossa School, Lucknow

04/2013 - 06/2014

## SKILLS

Regulatory Compliance

AML

Leadership

Artificial Intelligence (AI)

KYC

MIS

Communication

Problem Solving

Multi-Tasking

Finance Operations

Analytical

Creativity

Customer Due Diligence (CDD)

Adaptability

Financial Risk Management

Accuracy

Decision Making

Attention to detail

## CERTIFICATIONS

**IIM Visakhapatnam**- Executive Certificate in FinTech & Risk Management In Banking & Financial Services (Pusing)

**UDEMY**- Anti Money Laundering Concepts: AML, KYC and Compliance

**NPTEL (An IIT Initiative)** - Management In Commercial Banking

**UDEMY**- The Complete Foundation Stock Trading Course

## EXTRA CURRICULAR ACTIVITIES

• Part of communication team at BU level in current job.

• Won 2nd position in dance competition organized by Engagement Team at "Ameriprise Financial Services, LLC".

• Actively participated in various engagement activities such as "Fit-To-Fun", "Bollywood Frenzy", "Badminton Tournament" organized by Engagement Team at "Ameriprise Financial Services, LLC".

## AWARDS AND ACHIEVEMENTS

• Won AMMY Gold Award for achieving high productivity and maintaining 100% accuracy.

• Won AMMY Gold Award for migrating the process from U.S business partners to AMPI.

• Received multiple AMMY Thankyou Awards for helping out the peers and providing training's to the new team members.