

NAZIA SAFDAR ANIS

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Profile Summary:

- M.B.A. (Finance & Marketing) professional with 2 years of experience in Wealth Management, Client Relationship Management and Operations Management.
- Experienced in Relationship Management with corporate clients, and Marketing Management of wide range of financial products & services.
- Highly skilled in developing plans to cross-sell and up-sell alternatives for Revenue Generation, Revenue maintenance and customer satisfaction, while providing feedback to the product team via data collection on financial product performance.
- Expert in developing and sustaining relationships with high-net-worth clients by providing excellent financial planning services, investment advice and long-term wealth growth.

Work Experience:

- HDFC Bank (Private Banking Group) – Wealth. June 2022- December 2022
- ICICI Securities Ltd, Visakhapatnam. May 2019 – May 2022

Growth Path:

ICICI Securities

- Management trainee in May 2019 - August 2019
- Senior Relationship Manager in September 2019 – April 2020
- Key Relationship Manager in March 2020 – September 2021
- Chief Relationship Manager in October 2021 – May 2022

HDFC Bank (PBG- Wealth)

- Deputy Manager in June 2022- December 2022

Key Result Areas:

- Maximizing sales by launching proactive campaigns, developing existing accounts, generating new business through referrals and leads follow-up. For example in current financial YTD 64 New Customer Acquisition is achieved.
- Providing financial planning and retirement planning service-to the client for achieving their Financial Goals. SIPs worth INR 2.6 Million achieved YTD.
- Recommending financial products such as stocks, bonds, mutual funds and insurance to the Clients. Capital Gain Bonds worth 20 Million achieved YTD.
- Conducting periodical reviews of Client's existing investment portfolio and establishing long term relationships them. Churning of Portfolio resulted in good profits for clients. Managing and servicing combined portfolios of worth 77 crores.
- Evaluating the current financial situation of the clients such as income, expenses, insurance coverage, tax status, financial objectives, risk tolerance, etc and developing a financial plan, and also offering suitable money loans such as Home Loan, Business Loan, Education Loan or Mortgage Loans. Generated Leads worth INR 150 Million Home Loans & Disbursed worth INR 32 Million
- Efficient in cross selling of Financial Products for wealth creation to existing and new customers.
- Recognized multiple times in the Regional (East APT Region) Rewards & Recognition Meetings.
 1. Trophy & cash award for highest New Customer Acquisition Sept 2019

2. Trophy & cash award for achievement of target of premiums worth INR 200 thousands in Investment Cum Life Insurance Plans – Sept 2019
3. Trophy & Trip to PHUKET (Thailand) for achievement of target of premiums worth INR 1 Million in Various Insurance Plans – Nov 2019
4. Trophy & cash award for Second highest New Customer Acquisition Sept 2020
5. Won a Trip to PORTUGAL for achievement of target of premiums worth INR 3 Million in Various Insurance Plans – Nov 2021

Strengths

- Dedicated hard worker and a goal-based planner
- Good communication skills
- Target focused
- Excellent Analytical Skills
- Self-starter

Academic details:

- M.B.A (Finance & Marketing) from GITAM Institute of Management (Vizag)- March 2019

Certifications & IT skills:

- NISM Series VA for Mutual Funds.
- IRDA Certification for Insurance.
- Tally erp-9.
- MS Office Suite-Excel, PowerPoint & Word.
- FinTech Certificate Program
- Digital Marketing
- Udemy The Business Intelligence Analyst Course 2023

Family Background:

- Mr. Safdar Anis, Father, Businessman.
- Mrs. Rattan Safdar Anis, Mother, Homemaker.
- Mrs. Rafia Nabeel Mehdi, Sister, Married, Software Engineer.

Personal Information:

- **Date of birth:** 31st October, 1996
- **Languages known:** English, Hindi, Telugu, Gujarati
- **Hobbies/Interests:** Sports, Painting, Singing