

RIYA SHAH

AFFLUENT RELATIONSHIP MANAGER



CONTACT INFORMATION

Female

30-05-1996

riyashah3096@gmail.com

9638684220

Ahmedabad

OBJECTIVE

Fill in your Career's Objective

+ Shortterm (in the next 2 years).

Complete more and more certifications in different fields and seeking to increase sales and customer loyalty.

+ Longterm (In the next 3-5 years).

Want to go ahead in a leadership role

SKILLS

Language:

English/Hindi/gujarati and basic french

Making:

Have a good marketing skills and also can lead the team.

Computer:

Word, Excel, Powerpoint

Leadership:

WORK EXPERIENCE

2023 - NOW

ICICI BANK, AFFLUENT RELATIONSHIP MANAGER

Job Description

KRA is to identify trade potential customers into catchment.

Responsible for fees and revenue generation from branches mapped as such 2 branches is being handled by me.

Acquisition of trade current accounts

Liasoning with treasury for exchange rates

Co-ordinating with trade operations/customers and treasury for executing customer transactions

Assuring customer upon investment, FD, loans and services

Also need to handle queries of mapped client

Key interest area — bank guarantee/PCFC/FDI/ODI and other trade products.

2019 - 2023

KOTAK MAHINDRA BANK, Senior relationship manager

Responsible for managing 350 HNI clients for their day to day operations.

Cross sell and upscale of various bank products to mapped clients

Acquisition of new HNI customers from catchment.

To increase RNPS and TNPS of mapped clients. Investment advisory along with loans and advances to mapped clients

Increases PH from the mapped portfolio.

EDUCATION

June 2017 - March 2019

GLS UNIVERSITY, MBA-full time

MBA IN FINANCE (major) and MARKETING (minor)

Can lead the team

Good co-ordinating:

Co-ordinating with the clients and department.

INTERESTS

I like bharatnatyam
Want to certify myself in different trade/market/treasury and wealth management.

● June 2014 - March 2017

HLIC - AHMEDABAD UNIVERSITY, BCOM

12 th completed from MT CARMEL SCHOOL
AHMEDABAD - march 2014

ACTIVITIES

● 2019 - NOW

KOTAK BANK / ICICI BANK

Love to take leadership in every extra curriculum activity

HONORS & AWARDS

2019: For SIP s and MUTUAL FUNDS

2021-2023: For life insurance and other products

CERTIFICATIONS

2019: NISM

2019: IRDA