

SHITAL S. PATIL

ADDRESS

Jyoti nagar Chh.Sambhajinagar

CONTACT NUMBER

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PROFILE

Accurate Motivated Finance Student Highly Skilled Generating And Analyzing Financial Report Having. The Ability To Work In A Team & Also With In A Fast Paced Environment.

WORK EXPERIENCE

SIDHESHWAR CO-OP SOCIETY JALGAON .(2014-2016)

Clerk-

- ❖ Received Payment From Customers& Agent.
- ❖ BackOffice Service Provision.
- ❖ Daily Report Preparation.
- ❖ Prepared Daily Cash Report.

SAMRUDDHI WEALTH FINACIAL SECTOR JALGAON .(2016-2019)

Customer Service Executive. (Mutual Fund)

- ❖ Check All Mails & Reply.
- ❖ Forward Statement & Required Documents to Investors.
- ❖ Call to HNI Investor for New Schemes.
- ❖ Handling Customer Complaints & solving the Complaints.
- ❖ Handling Front office & Back Office.

HCL FINTECH CHH. ,SAMBHAJINAGAR (2022 TO TILL DATE)

Operation & Customer Service Executive (Mutual Fund)

- ❖ Guide to the Clients for Mutual Fund SIP, Lumpsum.
- ❖ Handling And Processing, Checking and Analysing All Mutual Fund's Applications Forms.
- ❖ Handling queries of Walk-in Customers & All Email, telephon calls reply.
- ❖ Handling queries of E KYC (Electronic Know Your Customer) and verifying the documents submitted with it.
- ❖ CO-ordinating with fund houses for Investors Statements.
- ❖ Operating Software for Fund Switches, New Sip, Stp , Swp & Lumpsum, Redemption etc.
- ❖ Ensuring that data is update in the investment portal
- ❖ All Transaction online NSE Platform, Mf center,CAMS 360,& Kfintech software knowledge .
- ❖ Ability to work collaboratively & independently.
- ❖ LenDenclub Investment. (Fmpp)

EDUCATION DETAILS

- ❖ April 2014 M Com - 69.40% N.M.U.Jalgaon.
- ❖ April 2012 B COM - 56.79% N.M.U.Jalgaon.
- ❖ Feb 2009 H S C - 72.33% Nasik Board
- ❖ March 2007 S S C - 65.84% Nasik Board.

CERTIFICATION

- ❖ NISM Series V-A-Mutual fund Distributors Validity-July 2024 to July 2027

SKILLS

- ❖ Interpersonal
Analytical ,Sincere Result oriented,
Ability to develop working relationship
& Team Player.

COMPUTER

- ❖ MS CIT - AUG2013-MSBTE MUMBAI
- ❖ Tally ERP 9

Languages

Marathi, Hindi & English.

INTEREST

- ❖ Listening to Music , Travelling.

I Here By Declare That the Above- Mentioned Information Is True For My Best of Knowledge & Belief For