

PRASHANT SAHAJWANI

MBA – Finance (ITM, Navi Mumbai), M.Com (University of Lucknow)

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Address: D-18, sec-H , Near Purania Chauraha, Aliganj , Lucknow

PROFESSIONAL SUMMARY

Investment & Banking professional with 4 years of experience in Sales & business development managing clients. Experience in wealth management with expertise in equity, mutual fund, home loans and life insurance products.

EXPERTISE

Relationship management, Business development, Mutual Funds, Equity, Insurance, Retail Banking, Client Engagement, Wealth Management.

CURRENT PROFESSIONAL EXPERIENCE

AEGON LIFE : Website Sales Manager (Sep-21 – Nov 22 , Remote; Lucknow)

Key responsibilities

- Acquisition of new customers by providing them with financial planning & investment advice.
- Acquisition of new customers for Life insurance products ; Facilitating the Policy issue to customer

Key Achievements

- Month on Month delivering sales target and policy issuance with client acquisitions

AXIS BANK : ASSISTANT MANAGER (Oct 19- June 20, Noida)

KEY RESPONSIBILITIES

- Acquisition of new customers for different financial products like homes loans, mutual funds, Life insurance and Equity.

ICICI SECURITIES - SR. RELATIONSHIP MANAGER (May 2018– Sep 2019; Mumbai)

Reporting to Branch Manager

KEY RESPONSIBILITIES

- Meeting retail clients and engaging with them on a frequent basis to build strong business Relationship with customers.
- Advice retails clients on various banking and financial products and services offered by the Bank.

- Profiling customers and providing them with wealth management solutions to cater to their specific needs.
- Acquisition of new customers by providing them with financial planning & investment advice.
- Cross selling, enhancing and upgrading existing customers.

SUMMER INTERNSHIP

ICICI AMC - MANAGEMENT INTERN (Apr 2017 – Aug 2017)

KEY RESPONSIBILITIES

- Conducted product and platform training in branches.
- Engaged with Clients to understand their preference for mutual funds amongst other financial products.
- Facilitated the empanelment process of IFAs and bringing them on-board.
- Promoted and created awareness about company's close ended mutual fund.

SCHOLASTIC CREDENTIALS

2018: MBA (Finance) from ITM Business School, Mumbai (67%).

2015: M.COM from National PG College, Lucknow (60%).

2013: B. COM from National PG College, Lucknow (60%).

2010: 10+2 from City Montessori School, Lucknow (81%)

TRAINING & CERTIFICATIONS:

NISM VA Certificate