

RESUME

Anurag

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Nangli Vihar
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Job Objective

Stand as a great asset to the organization for the responsibilities given by continuously learning & contributing with all the skill sets acquired & will acquire.

Professional Education

Degree	Year	Institute	Percentage
B.Com	2019	IGNOU	53%
Diploma in Computer science & Engg.	2013	Ambedkar polytechnic,delhi	65%
Class Xth	2010	CBSE Board ,New Delhi	82%

Technical Skills

- **Software:** Basic MS Word & MS PowerPoint & MS-Access, Intermediate level MS Excel.
- **Basic knowledge** in Computer applications.

Professional Snapshot

RELIGARE BROKING PVT LTD (Sep 2021- Till Date) - Deputy Manager Operation – Third Party Products

ROLE & RESPONSIBILITIES :-

(Verification,Importing,MF AUM/Insurance Reconciliation Co-ordination\Mapping\RTA Redemption Reporting)

VERIFICATION

- Verify the **Mutual Funds/LI(Hdfc Life,ICICI Pru)/GI(Care,HDFC Ergo & ICICI Lombard)** Transactions in order to track that the opted Product/Scheme has been correct or not as per our system and update the same on Verification Portal.And,On the basis of Verified Transactions Points will be given to Branch Dealer/Sub Brokers.
- Handling queries of Branch Dealer/Rm's for the Non-Verified/Canceled transactions and resolved the discrepancy on timely basis.

IMPORTING

- Import the RTA(Cams+Karvy) Feeds on a daily basis in Company software.
- Import the RTA Scheme+Sip Master in system software.
- Import the Brokerage(Cams+Karvy) on month on month basis and also check Existing and Suspense Brokerage(Duplicate Brokerage transactions).So,that accurate brokerage will be calculated and visible to our Dealer/Rm's.
- Import the SIP registered and SIP which are going to be expired files of both the RTA's in our system software.

RECONCILIATION

- Arranging the IRDA+ORC commission statements from various parent(GI+LI) companies.
- And, reconciling our issued cases through the commission statements and release the brokerage/commission to the concern Rm's.
- Reconcile the commission files and raising it to vendors in case of any disconnect.
- Preparing of Invoice of the GST amount deducted and sharing it to them to the vendors.
- After collection of renewal files from the different vendors I do the mapping and upload the same on our internal portal.
- To drive the renewal I send out various Renewal reports, emails, sending SMS and other communication emails on a regular timely basis.
- Reconciling AUM (CAMS+KARVY) files.So,that in our system software AUM will be showing accurately.
- Making of payout files for Business Partners.After verifying the business logged by the business partners and commission received from the vendors against the cases I make the payout file and share it with the finance team to release the payout.

MAPPING/REPORTING

- Mapping of Suspense RM/Branch Dealer/Investors to Accurate Codes.So,that Payout will be credited to correct Rm/Dealer.
- Mapping of New Transactions (Scheme+Type) of both the RTA's while importing RTA feeds.
- Reporting the RTA Redemption Transactions on RTA portals.

CO-ORDINATION & OTHER WORKS

- Arrange brokerage related details from different parent companies(LI/GI).
- Coordination With all the third party vendors like HDFC,ICICI Prulife,Future Generali,Bajaj Allianz ,Care health for regular business MIS, renewal due data, collection of commission files and reconciliation of the complete files.
- Arranging New plans and rates confirmation from Insurance companies.
- Co-ordinate with Rm/Branch Dealer through mails and calls for Code Mapping/Placing Order(Purchase+Redemption)/Mandate Status/SIP status.
- Co-ordinate with Parent Companies for Non-mapped cases in our Broking Code.
- Check POS(Point of Sales-Sub Brokers) forms and details updated on system and create their system ID for business purpose.
- Timely resolve queries received on mails and calls.

- Send New Logged SIP's with Mandate Status data to Calling Team.
- Co-ordination with RTA's/ AMC's regarding queries faced by our Dealer/Branch RM's and clients.

BAJAJ CAPITAL INSURANCE BROKING PVT LTD (2014- SEP'21) – Executive General Insurance Operation

(Verification,Auditing,Policy Issuance,Reconciliation & Co-ordination)

VERIFICATION

- Verify the documents in order to track that the opted product or scheme has been correct or not as per our system and send them to punching team.
- Handling queries of Rm's for the rejected transactions and resolved the discrepancy on timely basis.

AUDITING

- Quality checks of cases & send the docs to ops team for policy issuance/updates of transactions.
- If any type of discrepancy occurred resolved the same on timely basis.
For Ex: Incorrect/incomplete documents uploaded etc.

POLICY ISSUANCE

- Coordinate with the insurance companies for monthly business MIS's for policy issuance/updates of Audit transactions.
- Follow-up with Parent companies for any discrepancy in MIS.[For arranging the required fields and any kind of discrepancy found in business MIS]
- Follow-up with Parent companies for the logged and confirmed business MIS, pending cases or cheque bounce cases.
- Making various kinds of report ex. daily business report, login VS issued, Monthly Issuance vs Pending report and send it to all the concerned heads.

RECONCILIATION

- Arranging the IRDA commission statements from various parent companies.
- And, reconciling our issued cases through the commission statements and release the brokerage/commission to the concern Rm's.
- Check and update the Margin related issues.

ASSISTANCE & CO-ORDINATION

- ✧ Assist manager to make different kinds of reports.For Ex. Month wise sales comparison report,Channel wise business reports.
- ✧ Assist and help to arrange brokerage related details from different parent companies.
- ✧ Making Business Development report for Issuance Automation process.
- ✧ Arranging New plans and rates confirmation from Insurance companies.

Achievement

Project coordinated -(Investors A/C Opening and Issuance Centralization and Automation)

Worked closely with IT team to get an interface developed in order to upload the required documents like A/C opening forms, proposal forms etc. which could be viewed by A/C opening team and the Investor ID could be generated further.

Worked with IT team and shared inputs for implementing the additional requirements and changes required in issuance interface.

Worked with IT team and shared inputs for Auto-mated punching process.

Worked closely with IT team to get an automated interface developed in order to update the transaction.

Strengths

- Self-motivated and independent problem solving attitude.
- Confidence and hardworking.
- Adaptability to any environment and preference to take part in teamwork.
- Key player in challenging and creative environment.

Personal Details

Name	:	Anurag
Father's Name	:	Ravindra Prasad
Date of Birth	:	30 th july 1994
Marital Status	:	Unmarried
Languages	:	English & Hindi

I am forwarding my resume in your esteemed organization for your kind perusal & Favourable reply.

DATE:16-Jan-23

PLACE:New Delhi

Anurag