

VIVEK SHARMA

Financial Services Consultant



6 Years 0 Month



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Profile Summary

Working as a Financial Services Consultant provides expert advice to clients on financial planning, investments, insurance, retirement, and wealth management. They assess clients' financial situations, identify their goals, and recommend tailored financial solutions. These professionals may work for banks, investment firms, or insurance companies.



Key skills

- Documentation
- Excel
- Inside Sales
- Underwriting
- Operations Management
- Analysis



Personal Information

City

HNo. 1544 60 Feet Road Parvatiya Colony
Faridabad 121005

Country

INDIA



Languages

- hindi
- English



Education

B.Sc, 2024

Mangalayan University,
Aligarh

12th, 2017

Haryana, English

10th, 2015

Haryana, English



Work Experience

Nov 2024 - Present

Financial Services Consultant

ICICI Prudential Life

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Feb 2024 - Oct 2024

Credit Associate

Muthoot Homefin India (MHIL)

UnderWriting Application For Home loan and LAP. Making CAM Sheet ,Banking Analysing, And Make Eligibility Sheet.

Evaluated loan applications and conducted credit checks to assess applicant eligibility.

Initiating Mail To All related Departments And vendors

(RCU,FI,Legal,Technical) and followup Timely.

Evaluated loan applications and conducted credit checks applicant eligibility.

Generate Final Saction Loan in system After Decisioning.

Verified financial documents such as income statements, tax returns, and property papers for accuracy and compliance.

Ensured compliance with regulatory and internal credit policies, including KYC and AML guidelines.

file received after sales person check as per company policy login in system professional discus with customer making CAM eli sheet in excel , reports intiation on mail like RCU, FI,LEGAL AND TECHNICAL followup reports and Final sanction loan in system etc..

Sep 2020 - Feb 2024

Dip Executive Operations

SBI Card

Under writing Files As Per Company Policy Like KYC, Income Docs,Banking.

Managed daily credit card issuance, billing, payments, and customer onboarding operations. Telleconfirmation From Customers On call And Solve Issue if any.

Enter File Details on System portal.(Sales 24)

Implemented fraud detection and risk mitigation strategies to safeguard card transactions.

Supervised customer service teams, resolving escalations and improving cardholder satisfaction. Tracked KPIs and prepared reports on card activation, transaction volumes, and customer feedback.

Ensured that all operational processes were audit-ready and compliant with industry standards.