**RESUME**

**ALISHA PATTNAIK**

E-mail: alishaperk@gmail.com

Date of Birth : 30th Mar, 1992

Present Address : Pune, India

Phone/Mobile No : +91-8456076798,7978005528

**Career Objective**

To acquire a challenging position in your Organisation where I can effectively contribute my knowledge and utilise my skills and abilities for the improvement of your Organisation.

**Experience Summary**

Working as banking officer in HDFC AMC (Assets Management) with an overall experience of 3.5 years in handling all Mutual fund Portfolio & Operations related work. Responsible for understanding the market trends and advising customers for their investment portfolios. Managing backend office works related to mutual fund claims, investment and filing & billing feeds.

**Professional Experience**

**Client Service Officer For HDFC mutual Fund (Jul 2017 – Nov 2020)**

**Overview:-**

* Working as client service officer for HDFC mutual fund. Role involves handling customer service, operations and admin functionality.
* Handling all new accounts for Mutual funds portfolio management and advising them with suggestion
* Analysing markets trends and advising customers and accounts for appropriate investments
* Application reviewing and logging in, with timestamp check in.
* Maintaining all the reports, reviewing them before submitting CAMS team
* Handling all customers queries coming through walk-in and phone calls
* Participating in weekly calls with all stake holders for updates.
* Handling queries with regards to mutual fund documentation from customers and brokers.
* Sending feed in excel to backend team for billing & further processing

**Technical Skills**

* PGDCA, Tally

**Certificates and Achievement**

* Successfully completed NISM certification
* Completed major certification related to mutual fund like VA, XA XB and VC recommended by SEBI

**Educational Qualification**

Completed MBA in finance and HR from Institute of Managment and Information Technology, Cuttack under Biju Patnaik University of Technology (BPUT), Rourkela, Orissa.

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| **Year of**  **Passing** | **Board/**  **University** | **School/College** | **Degree/**  **Examination** | **Percentage/**  **CGPA** |
| 2015 | BPUT | IMIT Cuttack | MBA | 64% |
| 2013 | North Odisha University | D D College Keonjhar | B Com | 65% |
| 2010 | CHSE | D D College Keonjhar | 12th | 72% |
| 2008 | CBSE | GreenField School, Keonjhar | 10th | 59% |

**Hobbies**

* Listening to music.
* Exploring new places..

**Personal Profile**

Father’s Name : Late Mr. Anil Kumar Pattnaik

Mother’s Name : Smt Sasmita Pattnaik

Marital Status : Married

Languages Known : English, Hindi,Oriya

Religion : Hindu

Permanent Address : B-101, Swiss County, Thergaon,

Pune, Maharashtra- 411017

**DECLARATION**

I hereby declare that the information furnished above is true to the best of my knowledge and belief.

**Place :- Pune Alisha Pattnaik**