

MOHUA KUNDU

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Personal Profile

Date of Birth: 15th September 1985

Marital Status: Married

Nationality: Indian

Language Known: English, Bengali, and Hindi

Contact

Address:

23, Madan Mitra Lane, Kolkata – 700 006

Career Objective

Results-oriented finance and insurance professional with diverse experience as an Associate Life Planning Officer, Officer – Operation, and Financial Consultant. Adept at developing comprehensive financial plans, optimizing operational processes, and providing strategic advice to clients. Seeking to leverage my expertise in financial strategy and client relationship management to contribute to Associate Life Planning Officer and drive organizational success.

Skill Highlights

Technical Skills: Microsoft Word, Excel, PowerPoint, etc. Internet and Online applications.

Others Skills: Teamwork, Effective Time Management, Adaptive Nature and Quick Learner.

Experience

HDFC Life Insurance Company Limited

Insurance Consultant

(November 2022 to till date)

- Provided insurance products and strategies to meet their financial goals.
- Recommend suitable insurance plans, and help with policy selection and claims processes and analyzing risks, providing tailored solutions, and ensuring clients understand their coverage options.
- Ensured customer satisfaction by maintaining superlative customer service.

Shriram Housing Finance Limited

Operation officer

(March 2018 to January 2019)

- Manage and track collections of premiums or payments, ensuring timely and accurate processing.
- Oversee banking transactions related to insurance policies, including deposits, withdrawals, and reconciliations.
- Handle general administrative tasks such as document management, correspondence, and record-keeping.
- Compile and prepare detailed reports on operational metrics, performance indicators, and financial data to aid in decision-making and strategy development.
- Review and process files for loan or insurance sanction and disbursement, ensuring all necessary documentation and compliance requirements are met.
- Aid senior officers in underwriting tasks by preparing files, analyzing data, and facilitating the approval process for sanctions and disbursements.

Reliance Nippon Life Insurance Company Limited

Associate Life Planning Officer

(March 2017 to February 2018)

- Develop personalized life insurance plans and strategies based on client assessments. And Advise clients on suitable insurance products and policies.
- Assist with the application process, policy issuance, and ongoing management. And Maintain relationships through regular follow-ups, reviews, and updates on policy performance.
- Achieve sales targets and contribute to business growth by acquiring new clients and retaining existing ones. And Stay updated on industry trends and product offerings to provide informed advice.

Education

M.A. in Bengali from Vidyasagar University in 2008.