

Shalu Verma  
[vermashalu774@gmail.com](mailto:vermashalu774@gmail.com)  
+91-8840539582  
DOB: 21<sup>st</sup> September, 1998



## Academics

Program	Discipline/Specialization	Board/Institution	Year of Completion
MBA	HR & Marketing	ICFAI Business School, Jaipur	Feb'2022
B. Com	Commerce	University of Lucknow	June'2019
Intermediate	Math & Science	CBSE	May'2016
High School		CBSE	May'2014

## Allied Credentials

- Advanced Diploma in Office Automation by G-Net computers.
- Personality Development Training by Barclays Institute.
- TCS iON Career Edge – Young Professional.
- German – beginners by Udemy.
- Certified Digital Marketing by Accenture.
- Successful Negotiation: Essential Strategies and skills - University of Michigan.
- Corporate Finance Foundation by National Association of State Board of Accountancy (NASBA).
- Lean Six Sigma Foundation by Project Management Institute (PMI).

## Industry Experience

### Work Experience

#### Organization: Ameriprise Financial

- **Job Title:** Associate at Advice and Wealth Management (AWM)
- **Location:** Gurugram, Haryana
- **Duration:** Sep 2022 to till now
- **Key responsibility and achievements:**
  1. Gold Award for good performance.
  2. Experience in E-workflow, Cola, VTP (Virtual Transaction Payment) and TMS (Transaction Management System).
  3. Managing client funds. My work area includes transferring money from Ameriprise suspense account to Client account with accurate client details & account no. There are different work types – Incoming Payment and Financial Plan charge. Incoming Client Payment – Processing of client funds received from other broker dealer on closure of their accounts. In Financial Plan Charge – Calculation and setup of the recurring payment arrangement from client account as per their plan.
  4. Maintaining customer portfolios and accounts.
  5. Internal roles - Assigning batches to team, taking care of attendance sheet, taking care of errors.

### **Organization: ICICI Lombard**

- **Job Title:** Relationship Manager
- **Location:** Mumbai
- **Duration:** Feb 2022 – Aug 2022
- **Key responsibility and achievements:**
  1. Responsible for sales budget of the business sourced from partner channels through the location.
  2. Manage the partner relation at location level and co-ordinate internally with various functions like operations and finance
  3. Agent's recruitment and training.
  4. Portfolio management of various clients mapped.
  5. Management of client relationship with the help of the advisors as well as handling new clients.

### **Internship (MBA)**

#### **Marketing**

- **Organization:** Syscom Softech Pvt. Ltd.
- **Location:** Delhi
- **Duration:** 3.5 months
- **Project Undertaken:** "A Study of Branding and Promotional mix of Strategies with special reference to Syscom Softech Pvt. Ltd"
- **Key Learnings:**
  1. How to define the business need, or in marketing terms.
  - 2 Brand Awareness and Promotional Activities.
  3. Handling customer's account in CRM.
  4. Presentation & Demonstration.

### **Awards & Recognition**

- Vice-captain in college 2019
- Most disciplined student 2016
- President of the school 2016
- Giving name to one of the software's during Internship "HRio" i.e. human resources input output.