



**Priya Pandey**

**Contact:** 9696108434

**Email:** pandey.pri2000@gmail.com

**LinkedIn:** [LinkedIn Profile](#)

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### Career Objective

I am looking for an opportunity in a dynamic organization where I can learn and grow while contributing to the company's success. I am eager to apply my skills, enhance my professional abilities, and contribute positively to organizational goals.

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### Professional Summary

I am a fresher with hands-on experience of over 6 months working as an Insurance Partner in the banking industry and 3 months of internship experience in investment services. I have a solid understanding of financial terms such as KYC (Know Your Customer), fund analysis, and insurance solutions, and I am eager to apply my learning to real-world projects.

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### Education

**Post Graduate Diploma in Management (PGDM) – Finance**

IILM Academy of Higher Learning, Lucknow (2024)

**Bachelor of Commerce (BCom)**

LPCPS, Lucknow University, Lucknow (2022)

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### Work Experience

#### **HDFC Life Insurance Company Ltd**

**Executive Trainee**

**June 2024 – Present**

- Customer Needs Assessment: Understanding customer needs and offering suitable insurance solutions.
- Training: Completing training on insurance products, compliance standards, and regulations.
- Policy Knowledge: Gaining an understanding of insurance policies and related benefits.
- Customer Service: Assisting customers with inquiries and ensuring satisfaction.
- Compliance: Adhering to company policies and industry regulations.
- Sales Support: Helping with sales activities and product presentations.
- Reporting: Maintaining records and assisting in performance tracking.
- Team Collaboration: Working with team members to meet goals and improve service.

#### **Staywealthy Investment Services**

**Intern**

**May – July 2023**

- Assisted in customer onboarding, including creating and managing KYC documents.
- Contributed to portfolio management and fund analysis, providing insights on performance and asset allocation.
- Managed financial data and account information, ensuring accuracy and compliance with industry standards

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### Academic Projects

#### **Financial Analysis of ITC Ltd**

Conducted a detailed analysis of ITC Ltd's financial statements using tools like comparative and common-size analysis. Analyzed the company's trends and financial ratios over the last 10 years.

#### **Business Simulation: Healthy Nosh**

Participated in a business simulation competition and managed the finance department.

Responsible for fund procurement, investment, and financial decision-making.

#### **Research on Gig Workers**

Designed research methodology, sampling, and frame for a study on gig workers.

#### **Mutual Fund Performance Analysis**

Analyzed the performance of mid-cap equity mutual funds and evaluated their performance.

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### Certifications

#### **Digital Marketing Workshop**

OCP Academy, December 2022

#### **Self-Awareness & Interpersonal Dynamics using NLP**

IILM Lucknow, December 2022

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### Skills

#### **Technical Skills:**

MS Word, MS Excel, MS PowerPoint

**Soft Skills:**

Teamwork

Time Management

Organizational Skills