

SUMIT KUMAR

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CAREER OBJECTIVE

Results-driven Banca Channel Executive with experience in life insurance sales, bank coordination, policy processing, and customer servicing. Skilled in documentation, KYC verification, MIS reporting, and relationship management. Seeking opportunities in operations, KYC/AML, banking operations, or financial services roles.

EXPERIENCE

ICICI Prudential Life Insurance | Business Trainee July 2025 - Present

- Coordinated with bank branch staff to **generate investment and insurance leads**.
 - Assisted customers with **KYC documentation** and **policy onboarding**.
 - **Verified customer documents** before policy issuance.
 - Maintained **MIS reports** for daily sales and pending cases.
 - Followed up on **underwriting requirements** and policy issuance status.
 - Supported customers with **post-sales services** and basic policy queries.
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EDUCATION

MASTER OF BUSINESS ADMINISTRATION DUAL 2023-2025

GALGOTIAS UNIVERSITY | GREATER NOIDA

BACHELOR OF SCIENCE 2018-2021

RRS COLLEGE (PATLIPUTRA UNIVERSITY) | MOKAMA (PATNA)

SKILLS

- **Technical:** MS Excel, MS PowerPoint, MS Word, ERP.
 - **Domain Knowledge:** Business Operations, Financial Services, Client Relationship Management, Supply Chain Basics.
 - **Soft Skills:** Communication, Teamwork, Problem-Solving, Adaptability, Time Management
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CERTIFICATIONS

- **MS EXCEL (GREAT LEARNING)**
- **SIX SIGMA YELLOW BELT (6 SIGMA STUDY)**
- **PROJECT MANAGEMENT (GREAT LEARNING)**
- **ANTI-MONEY LAUNDERING & KYC BASICS (UDEMY)**