

YASH GUPTA

Client Relationship Executive

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📍 Meerut (U.P)

Client Relationship Executive with experience in financial services, compliance reporting, and operational coordination. Skilled in client servicing, MIS reporting, taxation documentation, and cross-functional collaboration. MBA (Finance & Marketing) with strong analytical and communication abilities, seeking to contribute to a growth-oriented organization.

Professional Experience

Client Relationship Executive | Trustline Securities Ltd

Aug 2023 - Aug 2025

- Served as the primary point of contact for clients, addressing service inquiries and resolving issues efficiently to ensure high satisfaction levels.
- Prepared and submitted MIS reports, ledger reports, capital gain statements, and taxation reports within regulatory timelines.
- Coordinated with internal departments to improve workflow efficiency and ensure seamless service delivery.
- Implemented and followed operational policies in line with industry regulations and company standards.
- Ensured timely compliance reporting and maintained accurate financial documentation.

Technical Skills

Advanced Microsoft Excel

Tally Prime

MIS & Financial Reporting

Compliance & Documentation

Basic Knowledge of Capital Gains & Taxation

Client Relationship Management

Soft Skills

Professional Communication

Problem Solving

Time Management

Team Coordination

Self-Motivated & Detail-Oriented

CERTIFICATIONS

- MS Office - Basic
- Advanced Excel (VLOOKUP, HLOOKUP, XLOOKUP, Pivot Tables, Data Validation, Mail Merge)
- Power BI - Pursuing

Education Background

- Master of Business Administration (Finance & Marketing)
GL Bajaj Institute of Management, AKTU | 2023
- Bachelor of Commerce (B.Com)
Chaudhary Charan Singh University | 2019
- CA-CPT
Institute of Chartered Accountants of India | 2016

ACTIVITIES & ACHIEVEMENTS

- Actively participated in cultural activities at the college level.
- Played Volleyball at the college level.