



NEETHU GOPI

PROFESSIONAL SUMMARY

Experienced banking and insurance professional with a strong background in sales, customer relationship management, compliance, and branch operations. Skilled in identifying business opportunities, providing tailored financial solutions, and ensuring regulatory adherence through AML checks and KYC compliance. Proven ability to achieve sales targets, build lasting client relationships, and streamline operations to enhance customer satisfaction.

WORK EXPERIENCE

RELATIONSHIP OFFICER | March 2023 – August 2023

NATIONAL BANK OF RAS AL KHAIMAH

Key Responsibilities

- Identified business opportunities by evaluating prospects and analyzing sales options.
- Administered compliance with sales objectives and monitored adherence to internal guidelines and bank procedures.
- Responded to customer queries promptly, ensuring resolution and maintaining high service standards.
- Built and maintained customer relationships by recommending tailored financial solutions.
- Achieved or exceeded core product sales targets to expand the customer base.
- Ensured customer applications & documentation were complete, accurate, and compliant with risk management policies.
- Resolved customer issues, facilitating seamless customer service experiences.

ACADEMIC COUNSELLOR | May 2022 - February 2023

GTEC COMPUTER EDUCATION THIRUVALLA, KERALA, INDIA

INSURANCE ADVISOR | March 2021 – April 2022

UNION INSURANCE PJSC

INSURANCE ADVISOR | August 2019 – January 2020

ORIENT INSURANCE PJSC

Key Responsibilities

- Generated leads through tele-calling, email marketing, direct marketing, walk-ins, and customer referrals.
- Proposed customized insurance solutions aligned with customer needs and financial goals.
- Recommended investment and insurance strategies based on customer requirements and market analysis.
- Conducted regular reviews and advised clients on fund-switching for better returns.
- Performed AML checks to ensure compliance with regulatory requirements and industry standards.
- Resolved complex customer inquiries efficiently, maintaining high levels of customer satisfaction.

CONTACT INFORMATION

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Abu Dhabi, UAE

EDUCATION

MASTER IN BUSINESS ADMINISTRATION (MBA) FINANCE AND MARKETING

- MG university, Kerala, India

BACHELOR OF SCIENCE

- MG University, Kerala India

SKILLS

- Multi-tasking ability
- Innovative
- Dynamic
- Team player
- Excellent presentation skills
- Leadership quality
- Analytical skills
- Good Communication
- Inter personal skills
- Reasoning ability

COMPUTER PROFICIENCY

MS Office ★★★★★
Tally ★★★★★
Peachtree ★★★★★
IFRS ★★★★★
Internet & Email ★★★★★

PERSONAL DOSSIER

Gender : Female
Date of Birth : 27/12/1992
Nationality : Indian
Marital Status : Married
Visa status : Spouse visa

LANGUAGES

English
Hindi
Tamil
Malayalam

REFERENCE

- Available upon request

- Designed and advised on tailored insurance products to meet customer needs.
- Ensured client documentation adhered to industry regulations, maintaining risk-free transactions.

ASSISTANT MANAGER – BRANCH OPERATIONS | December 2015 – May 2018
AXIS BANK LTD., THIRUVALLA, KERALA, INDIA

Key Responsibilities

- Delivered exceptional customer service by handling inquiries about online banking, account information, and product offerings.
- Managed deposits, withdrawals, transfers, and account setups for savings, bonds, and other investment solutions.
- Processed loan and overdraft facilities, ensuring compliance with banking regulations.
- Performed cash and cheque deposits, NEFT, RTGS, tax payments, cheque clearing, and safe deposit services.
- Conducted KYC screenings for account openings, loan applications, and regular deposits to ensure regulatory compliance.
- Collaborated with business line executives to offer tailored investment solutions, including mutual funds, bonds, and insurance.

DECLARATION

I hereby declare that the above-mentioned information is true, and I bear the responsibility for the correctness of the above-mentioned particulars.

NEETHU GOPI