

Dattatraya Anil Bidwai

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Profile Summary:

To Work in a error free environment and assure that all the process laid by the bank are followed properly without any deviations under the guidance and supervision of Management & ensure branch customers are adequately serviced and appropriate product sold to them.

Work Experience:

BDSP & Associates (CA Firm)

Accountant

From 02 Dec 2021 (Present Working)

Job Profile:

- Responsible Accounts work like, Input and Output Entries
- Gather the necessary materials, such as yearly tax tables, instructions, and forms, in order to accurately compute taxes for clients.
- Manage and keep the company's tax database up to date
- GST Accounting
- Collaborate with clients to gather personal information about prospective deductions, educational grants, or allowances.
- **Inform clients of the important papers and documentation required to correctly complete tax forms**
- Prepare tax returns, payments, paperwork, and reports as needed.

➤ **Axis Bank**

Deputy Manager

Customer Service Officer

30th Sept 2019 to 30 Aug 2020

Job Profile:

- Authorizations of Cash and Non-Cash Transactions.
- Responsible for maintain register and reports.
- Follow the process of Deliverables management.
- Responsible for CASA RE-KYC done within TAT.
- Sourcing leads for CASA, Mutual Funds, Demat A/C, General & Health Insurance, Loans

- Responsible for getting new clients in order to Account opening (CASA), Demat Account Opening, Various types of Loans, Credit cards
- Responsible for achievements for Quarterly Sale target and Satisfactory Audit for my KRA.
- Following Locker issuance process.
- Meeting on filed with Existing clients- in order to build relationships and maintaining reports.
- Handling sales & distribution clients and solving their queries. - Managing clients- portfolios and recommend them various investments.

➤ **Jana Small Finance Bank Limited**

Customer Relationship Executive (CRE)

Senior Executive

Retail Branch Banking

19/09/2016 to 29/06/2019

Job Profile:

- Responsible for Productivity of Customer Relationship Executives (Operations).
- Cash & ATM Operations Management of the Branch
- Branch Lobby Management & provide Best customer Service.
- Responsible for CTS Clearing of the Branch
- Provide Solutions on customer queries and cross sell different products from walk in customers.

➤ **HDFC Bank Ltd,**

Personal Banker

Assistant Manager

Nanded Bank Branch

01-12-2014 to 06-09-2016

Job Profile:

- Responsible for welcome desk all activities.
- Looking after CASA, TPP like General Insurance, life Insurance, Health Insurance etc.
- Monitoring Hygiene Parameter of account opening depletion and activation control.
- Inputer for Transaction of Cash and Non Cash Transactions,
- Monitoring of Deliverables management, welcome Calling reports and Large Transactions Reports..
- Sourcing Asset Products i.e. Home loans, CV, TW, Personal Loan, and Business Loan and TPP

products.

- Processing of AOF.
- Reconciliation of Insta Kits, IPIN, DD, PO etc.
- Processing NEFT, RTGS or Clearing Cheques.

➤ **ICICI BANK LTD**

Officer

Tuljapur, Maharashtra

22 Nov 2013 to 12Nov 2014

Job Profile:

- Handling Teller counter and Maker for all Transactions
- Activate Digital Channels (Internet Banking ,Mobile Banking & Debit Card)for each account.
- Sourcing of Current a/c and Saving a/c as well as Third party products like Life and General Insurance
- Focus on high value of Current account and savings accounts
- Meeting of Month on month CASA Targets.
- Create Gold loan Accounts and disbarment
- Increment of high value in CASA accounts at every quarter.

Licenses & Certification :

1. **NISM Series V-A Mutual Fund Distributor Certification**
(Issued on May 2024)
2. **IRDA Certified**

Education:

- Diploma in PGDBO from NIIT, Pune 2013(Banking and Finance Operations and sales)
- Graduate in BBA (Bachelor of Business Adminisstartion 2013), STRM Univerty, Nanded
- 12th 70% in commerce , 2010
- 10th 70% , 2008

Language : English, Hindi, Marathi

Declaration

I hereby declare that the above things furnished by me are best to my knowledge

Dattatraya Bidwai