

PREETHI S

Junior Executive - Finance



Contact Details



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Chennai , Tamil Nadu , India

Expertise

- Phone Banking
- Insurance claiming
- KYC verification
- Cash Maintenance
- Cash Handling
- Team Handling
- Banking Protocol
- Problem Analysis
- Sales promotion
- Collection Maintenance
- Data Handling
- Customer Handling
- Problem Solving
- Customer satisfaction
- Managing customer Relation
- Maintaining customer Relation
- Customer service skills

Languages

- English
- Tamil

Professional IT Skills

- Proficient in MS office
- MIS
- NOVA
- UNO
- ZIVA
- ERP
- MNOVA
- MZIVA

Experience

Currently working with Shriram Finance Ltd.

Junior Executive 2022 - July 2024

Key Result area:

Loan Document Processing & Customer Relationship Management

- Handle various loan types (vehicle, personal, business) and manage associated documentation.
- Coordinate with stakeholders (business heads, regional/zonal heads) for timely approvals and closures.
- Oversee account payables, receivables, and general accounting functions.
- Maintain accurate customer records.
- Identify and onboard suitable customers.
- Build strong customer relationships through effective interaction and communication.
- Establish new business networks to achieve sales targets.
- Deliver exceptional customer service to maintain customer satisfaction and loyalty.

Senior Customer Service Executive (International Non -Voice process) – 2019-2020
for Tele Performance Global Service Pvt Ltd – Chennai , India

Key Result area:

- End to end FATCA/CRS experience (Classification, Validation, Filling & Reporting)
- FATCA/CRS Models,XML files
- Follow up and collate KYC documentation from client
- Review and scrutinize KYC documentation received ensuring it is appropriate for the risk rating level applicable to the client
- Carry out screening (Name list screening and Negative News Searches (in line with Apex Screening Procedure)
- Prepare KYC checklists and arrange for review
- Prepare Location-wise Local AML Risk Assessment and arrange for review.
- Input all KYC Information Collected on KYC Application / Tool
- Attend to KYC Queries
- Perform operational Onboarding tasks
- Support the Senior KYC Analyst, KYC Team Leader and the Onboarding Managers

Education

- B.COM - with 61% @ Thiruthangal Nadar College - Chennai
- XII - with 63 % @ Lady MCTM Higher secondary School Chennai
- Xth - with 80% @ Gnanodaya Higher secondary School Chennai