

DEEKSHA POOJARY

PROFESSIONAL SUMMARY

Detail-oriented MBA graduate with a specialization in Business and Law from Roehampton University, London. Proven ability to work independently and as part of a team. Extensive experience in client servicing, financial analysis, and strategic planning. Seeking opportunities to leverage my skills and contribute to dynamic teams.

CONTACT

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Bhayandar East 401105

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Email: dkpoojary101198@gmail.com

LinkedIn: linkedin.com/in/deeksha-poojary-7b998b1b5

WORK HISTORY

Senior Officer, 12/2019 to 01/2023

IIFLW Portfolio Managers - Mumbai

- Order Management Desk: Coordinated with Relationship Managers (RM), Senior Relationship Managers (SRM), and clients for investment-related emails, ensuring relevant checks were performed before sending.
 - Exit RM - SRM Process: Managed the process changes in RM & SRM within required systems and communicated with clients.
 - Coordinated with RM Team Leaders (TL) & SRM TL for new RM details.
 - Client Event & Communication: Worked on invitee lists, sent invites and email teasers, and managed RSVP confirmations.
 - Prepared MIS for analysis
 - AMEX: Sent invites to qualifying clients, coordinated with AMEX for appointments, and managed client queries
 - Initiatives: Coordinated initiatives tracker
 - Query Management (Salesforce): Prepared analytics for queries raised through CRM and followed up on pending queries for more than 3 days.
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WEBSITES, PORTFOLIOS, PROFILES

- linkedin.com/in/deeksha-poojary-7b998b1b5
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SKILLS

- Client Relationship Management & Customer Service
- Financial & Data Analysis
- Strategic & Business Planning
- Problem-Solving & Decision-Making
- Team Collaboration & Communication
- Legal Frameworks & Compliance
- Advanced Excel & Technology Adaptation
- Time Management & Organization
- Active Listening & Interpersonal Skills

EDUCATION

Master of Business Administration

Roehampton University - London, England
January 2023 – April 2024

Bachelor of Commerce (B.Com)

Nagindas Khandwala College of Commerce & Economics, Mumbai
April 2019

Certificate of Higher Education in Commerce

The Bomday Suburban Grain Dealers Junior College, Mumbai
April 2016
