

Curriculum Vitae

Rajat Dixit

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TOTAL EXPERIENCE : More than 19 Yrs. in Financial Market with 18 years in Team handling profile comprising of distribution of financial products along with Biz Development & Team Handling involving acquisition of clients & revenue generation.

Objective:

To serve the organization with diligence and perseverance offering my utmost to carry on efficiently whatever responsibility is put on my shoulders.

Work Experience:

Motilal Oswal Wealth Management Services – 2nd May’24 – Present.

Job Profile –

Vice President – Group Leader – PCG Advisory & Sales.

Heading PCG (Private Client Group) desk for UP & Uttarakhand.

Responsible for team building /handling & onboarding of client base across geography .

At present handling Sales & Advisory teams to source & manage TPP & Broking revenue with utmost emphasis on AUM building.

Being a wealth desk we are dealing primarily into MF , AIF , PMS & Bonds + other Investment products.

HDFC Securities 1st Oct’2007 – 31st April’24

Job Profile –

State Head (Uttar Pradesh & Uttarakhand) .

My job role was bifurcated into 2 major responsibilities / divisions -

• Activation & Revenue –

As SH I was managing overall 16 branches across UP. & UK. with the help of 2 Cluster Heads, 16 BMs & 75 Dealing Relationship Managers who manages retail / HNW/Corporate client relationships & generate revenues by broking income , MTF Interest Income & TPP Biz thru MF , PMS/AIF & other Investment products.

• Acquisition & Revenue –

Client Acquisition Team/ Retail Sales Team also use to report into me which comprised of 3 Cluster Heads , 18 Area Sales Managers & 125 Sales Officers mapped to various HDFC Bank branches who were responsible for acquiring new Retail / HNW / Corporate clients & for generating revenue through AOC (Account Opening Charges) & TPP Biz.

• I was responsible for maintaining Bank relationship especially with senior most officials for getting our acquisition targets meet out & to penetrate into Bank's managed & HNI client segment.

• I was also entrusted with training of my team on various products & maintaining HNW client relationship across all the locations in both the states – UP & UK.

Escorts Securities Ltd. Sep. 2006 --- Sep. 2007
Branch Manager

Job Profile –

- Managing whole branch and achieving targets for the branch.
- Inspiring my team to generate more revenue and acquire new clients.
- Establishing new franchise in whole U.P.
- Achieving targets for Mutual fund selling.

Unicon Investment Solutions Oct. 2005 – Sep. 2006
Relationship Manager

Job Profile –

- Acquiring new clients for the organization to increase the volume of portfolio investment with the organization.
- Portfolio management of allotted investors .
- Selling Multiple Financial products to the Clients.
- Meeting targets of the Goal sheet

Professional Qualification:

Certified International Investment Analyst course from ICFAI University .

Education :

Post Graduation (**MPA – Master of Public Administration**), 1st division, Lucknow University, 2001.

Graduation from Lucknow University, 1997.

XII Standard from Mahanagar Boys Inter College, Lucknow, 1994.**Received National Scholarship** for three years.

X Standard from Mahanagar Boys Inter College, Lucknow, 1992.**Received State Scholarship** for two years.

Hobbies : Earlier it were all outdoor sports but now Reading & Driving are on top in the list.

Personal Details:

Date of Birth: 6th February, 1977

Marital status: Married.

Father's Name & Designation: (Late) Dr . M B L Dixit. (Retd.) Prof. Lucknow University.

Date:

(Rajat Dixit)