Shahezad Mahagami (B.Com, MBA with 8 yrs. US Retirement 4O1 K Plan)

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**Objective**

With 8 Years of experience in 401 K Retirement Plan, want to continue my successful career with Analysis expertise, keen analytical skills, and critical teamwork abilities.

**Professional Experience**

**Company: Principal Global Services Ltd**

Designation: Senior Analyst

**Duration: Mar 2015 to Till Date**

**Roles & Responsibilities:**

* Having good experience in revesal processing for Withdrawal, Distribution and Contribution.
* Having good experience in calculating reversal earnings for members.
* Having good experience in revesal all subtypes of Withdrawal and Distribution.
* Processing withdrawal application received from US Head office for participants and review eligibility and criteria, and process accordingly.
* Processing Distribution application received from US Head office for participants and review eligibility and criteria, and process accordingly.
* Processing various kind of Refunds subtype such as Excess contribution Refund, Excess Deferral Refunds.
* Working with IT Department on BOT in providing requirement to automate various Subtype.
* Conducted timely Training sessions on various subtypes and shared all updates with the team members.
* Uploading the data into system so that the retirement funds are enrolled into US market.
* Working on pension plans (401K) of Principal Financial Group by building new participant as per the contract and ensuring their money is invested in selected funds.
* Details received through a correspondence scanned by Head office USA.
* Distribution of investments according to the correspondence received.
* Processing the Investment elections and updating the system accordingly.
* Managing the personal as well as official details of participants.
* Updating the beneficiaries of participants for primary and contingent.
* Creating the manual requests in the system, as per the requirement.

Company: Infosys BPO Ltd

Designation: Senior Process Executive

Duration: April 2012 to March 2015

Roles & Responsibilities: Accounts Receivable

* Allocating the payments received by the customers to the correct account as well as the correct invoices or bills
* Deal with all payments received into Bank Account via Direct Debit, Credit Card, Cheque.
* Handling the customer queries related to Accounts Receivable
* Reversal of payments as per the request received
* Posting daily payments in SAP customer account
* Automatic payments for airtime, Cost Center and equipment in the SAP
* Cancel and Reissue the cheques to the customer through CSS Application.
* Refund to the customer through CSS Application.
* Handling customer queries related to payments & refunds.
* Refund the overpayment to the customer.

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Achievements:

Received Rising Star Award in Infosys BPO Ltd.

Worked as Relationship Manager in Bonanza Portfolio Ltd Dec ’07 to May’09

Responsibilities:

* Acquiring the clients across Mumbai city.
* Generating Brokerage.
* Advice the client about commodity and capital Market.
* Servicing the customers while dealing, trade execution, trade confirmation, updating clients on research reports.
* Handle Customer queries
* Handle the portfolio of client.
* Visiting branches across Mumbai city.

Achievements:

* Successfully initiated revenue for two of the major branches of Mumbai.
* Successfully achieved the target.

Educational Qualifications

* MBA (Marketing) from Bharati Vidyapeeth Deemed University, Solapur (2007)
* DBM from Solapur University (2005)
* Bachelor of Commerce from Shivaji University (2004)

Computer Proficiency

* Platforms: Windows Xp, Win 9x & DOS.
* Package : Tally 7.2
* Office Suites: Advance Excel, MS-Office 2002/Xp

Extra-curricular Activities:

* + - Participate in annual seminars.
    - Participated in sports activities of college.
    - Participated in “Mega Marketing” competition in college.

Place:

Date: (Shahezad Mahagami)