

SUSMITA DEVI



SUMMARY

Dynamic and client -focused banking professional with over 2 years experience in Retail Banking and Wealth Management roles across leading financial institutions. Proven expertise in Relationship management, client acquisition (including NRI and HNI clients), revenue generation, and compliance process. Adept at leveraging core banking system like Flexcube and CRM tools to streamline tasks, access critical client information, and enhance service delivery. Achieved a BFSI score of 79.91 in the TCS National Qualifier assessment. Strong interpersonal and analytical skills with a consistent focus on compliance, operational accuracy, and client satisfaction.



EXPERIENCE

SBI Caps Securities

03/01/2024 - 07/01/2025

Wealth Relationship Manager

Liasing with SBI Wealth RM to identify and acquire new NRI and high- networth clients.

Developed and maintained strong client relationships to drive consistent revenue growth for the company.

Offered tailored financial solutions and investment advice aligned with clients financial goals and risk profiles

HDFC Bank

17/07/2021 - 16/02/2022

Deputy Manager

Managed a diverse portfolio of clients, delivering personalized financial guidance and solutions

Addressed customer queries and concerns effectively, ensuring high levels of client satisfaction.

Supervised cash handling operations, including accurate balancing, vault management, and compliance.

Utilised banking software such as flexcube and CRM tools to streamline service delivery and improve data accessibility.

Ensured accurate and timely KYC documentation and compliance adherence

HDFC Bank

07/20 - 02/21

On- the Job training

Participated in HDFC Future Banker's Programs, gaining valuable on-the-job training and experience.



EDUCATION

Manipal academy of Higher Education

2023

MBA in Banking and Finance



CONTACT

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SKILLS

Sales

Communicator

CRM

Excel

SQL



LANGUAGES

English, Hindi, Assamese



PERSONAL DETAILS

Date of Birth : 01/01/1995

- **Gauhati University**
2017
B.Sc in Biotechnology
- **Hajo HSBSKR HS School, Guwahati**
2013
Intermediate
- **Prajyotish School**
2011
High School



LICENSE AND CERTIFICATIONS

- **License & certifications**
NISM Series-V-A-Mutual Fund
NISM series-VI- Depository Operations
IRDA Licence
Coursera, Google Data Analytics Certification