



FARHEEN KHAN

BANKING PROFESSIONAL

PROFESSIONAL SUMMARY

Accomplished banking professional with over 5 years of progressive experience in relationship management, portfolio management, and financial product sales. Proven track record of exceeding sales targets, delivering exceptional customer service, and managing NRI client portfolios. Adept at cross-selling financial products, risk assessment, and compliance with regulatory standards. A results-oriented individual with expertise in wealth management, financial advisory, and market analysis, seeking to contribute to the dynamic banking sector in Dubai.

CONTACT

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WORK EXPERIENCE

Senior Management - Private Banking | Feb 2024 – Jan 2025

Aditya Birla Sun Life Insurance

- Managed sales and operational activities, achieving a balance of 40% operations and 60% sales.
- Advised customers on suitable insurance and investment policies, leading to increased policy conversions.
- Supported branch staff in sales efforts and ensured efficient documentation and KYC verification processes.
- Conducted customer meetings at their convenience and performed targeted calls on FD, PL, home loan, BL, and locker data.
- Provided end-to-end service before and after sales, ensuring customer satisfaction.

Key Account Manager (Deputy Manager) | Dec 2022 – July 2023

IndusInd Bank

- Managed diverse portfolios, including high-net-worth NRI clients, ensuring exceptional service delivery.
- Developed and executed effective marketing strategies, leading to increased customer acquisition and retention.
- Achieved and exceeded sales targets across various financial products.
- Processed transactions with accuracy, ensuring compliance with branch operational standards.

Personal Banker (Deputy Manager)| Oct 2021 – Aug 2022

HDFC Bank

- Provided personalized financial solutions to a portfolio of over 150 clients.
- Successfully sold financial products including insurance, loans, and mutual funds.
- Strengthened relationships with NRI clients, meeting their financial needs with tailored solutions.
- Provided expert advisory on currency exchange rates, cash balancing, and transaction accuracy.

Relationship Manager (Deputy Manager)| Oct 2020 – Oct 2021

RBL Bank

- Provided personalized financial solutions to a portfolio of over 150 clients.
- Successfully sold financial products including insurance, loans, and mutual funds.
- Strengthened relationships with NRI clients, meeting their financial needs with tailored solutions.
- Monitored transaction accuracy and ensured adherence to compliance procedures.

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WORK EXPERIENCE

Teller (Assistant Manager) | Jan 2020 – Sept 2020

Suryoday Small Finance Bank

- Oversaw branch operations, ensuring smooth workflow and accurate reporting.
- Consistently achieved sales targets across financial products and loan categories.
- Conducted marketing activities to enhance lead generation and business growth.
- Ensured effective cash flow management by adhering to cash balancing protocols.

Assistant Key Account Manager (Assistant Manager) | Sept 2019 – Dec 2019

TATA AIA Life Insurance

- Streamlined sales and operations processes to ensure client satisfaction.
- Managed policy documentation, achieving a high first-time-right rate.
- Contributed to the growth of NR Exclusive and Pioneer RM accounts.

Corporate Agency Manager (CAM) | Jan 2017 – Aug 2019

HDFC Life

- Balanced operational responsibilities (40%) with sales activities (60%).
- Advised clients on tailored insurance solutions, increasing policy conversions.
- Provided training and support to branch staff to boost overall performance.

ACADEMIC HISTORY

Master of Commerce (M.Com), University of Mumbai, 2016–2018

Bachelor in Banking & Insurance, University of Mumbai, 2013–2015

KEY SKILLS

Domain Knowledge: Financial Product Knowledge, Portfolio Management, Relationship Management, Wealth Management, Investment Strategies, Corporate Banking, Digital Banking, Cash handling, Money validity verification, Transaction recording, Cash balancing

Soft Skills: : Customer Acquisition & Retention, Relationship Building, Communication Skills, Problem-Solving, Client-Centric Approach, Customer inquiries, Administrative Support, Multitasking, Organizational skills.

Technical Skills: Compliance & Regulatory Knowledge, Financial Planning Tools, Risk Assessment, CRM Systems, Transaction processing, Cash flow management.

Analytical Skills: Sales Target Achievement, Market Analysis, Data-Driven Decision Making, Asset Management

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LANGUAGES

- English (Fluent)
 - Marathi (Fluent)
 - Hindi (Fluent)
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AWARDS & RECOGNITION

- Monthly Incentive Achiever (HDFC Life)
 - Promoted to Corporate Agency Manager at HDFC Life
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HOBBIES

- Exploring new places and traveling
- Creative pursuits