



SRINIVAS NAGULA

FINANCIAL ADVISOR &
CUSTOMER SERVICES

Contact

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Address

Room No 104, 1st Floor. Building no 38.
Behind Central Mall.Sharaf DG Bur Dubai.

Education

Secondary School Certificate

Mumbai University Board
2006-2007

Higher Secondary Certificate

Mumbai University Board
2008-2009

Skills

- Sales Strategies
- Negotiation Skills
- Problem-Solving
- Time Management
- Presentation Skills
- Lead Generation
- Market Research
- Customer Needs Analysis

Language

- English
- Telugu
- Hindi
- Marathi

About Me

Seasoned Senior Relationship Manager with extensive experience managing Key client relationships, driving growth and delivering tailored solution. Skilled in strategic planning, client retention and cross functional collaboration. Known for a consultative approach, strong communication, and a commitment to exceeding client expectations in dynamic, result-driven environments.

Professional Experience

Feb
2024

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Feb
2025

Key Relationship Manager

Bajaj Allianz Life Insurance Company Ltd |India.,Mumbai

- Advised clients to life insurance.
- How it is important to us for our family security purpose.
- Built strong client relationships through follow-ups and excellent service.

Feb
2023

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Oct
2023

Senior Relationship Manager

Robinhood Broking Insurance Pvt Ltd | India.,Mumbai

- Advised clients to life insurance, general insurance and Mutual Funds.
- Built strong client relationships through follow- ups and excellent service.

May
2020

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Jan
2023

Sales Advisor

Policybazaar.com |India., Mumbai

- Advised clients to Term Life Insurance.
- Guide clients in selecting coverage that best meets their needs.
- Achieve sales targets and build customer relationships.

Sales Officer

All Services Global Pvt Ltd |India., Mumbai

- Advised clients to life insurance,general Insurance andloansproductbasedontheirspecificneed..
- Guide clients in selecting coverage that best meets their needs.
- Achieve sales targets and build customer relationships.
- Provide advisory on renewals, endorsement and coverage upgrades.

July
2015

-

Mar
2020

Declaration

I therefore confirm that the information above is accurate to the best of my knowledge, and I assume full liability for the accuracy of the data that has been provided.