

CURRICULUM VITAE

Aakash Sathe - CFP®	Email ID –akashgunwantsathe@gmail.com
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Career Objective:

- To secure a challenging position where I can effectively contribute my skills to the organization.
- Displaying my teamwork qualities with my competent technical skills and effective communication skills for the development of the organization.

Technical Background

- Highly motivated and results-driven Sales Representative with over 7+ years of experience in the insurance industry as well as banking institute.
- Proven track record of building strong client relationships, driving sales growth, and exceeding performance targets.
- Strong communicator with in-depth knowledge of various insurance products, including life, health, auto, and property insurance.
- Adept at identifying customer needs, recommending suitable solutions, and closing deals effectively.

Area of Experience		
Domain	Total 7+ Years of experience in various domains. <ul style="list-style-type: none">• Insurance Sales & Marketing• Customer Relationship Management• Lead Generation & Prospecting• Needs Assessment & Solution Selling• Sales Presentations & Negotiation• Client Retention Strategies• Cold Calling & Networking• Cross-selling & Up-selling	<ul style="list-style-type: none">• Regulatory Compliance & Insurance Policies• CRM Tools (Salesforce, HubSpot, etc.)• Strong Verbal & Written Communication• Team Collaboration & Leadership• Health insurance• Life insurance• Recovery Department• Sales Rep for Internet services
Software Knowledge	<ul style="list-style-type: none">○ Microsoft tool set – Word, PPT, Excel etc.○ Python○ Visual Studio	

Job profile

- Shriram City Union Finance
Designation: - Recovery Executive (From Jan 2017 – June 2018)
- Fibernet ISP Pvt. Ltd.
Designation: - Sales Executive (From July 2018 – Mar 2022)
- HDFC life Insurance company Ltd.
Designation: - Business Development Manager (From Mar 2022 – Mar 2024)
- Policy Bazar
Designation: - Relationship Manager (From Sep 2024)Onsite Experience
 - Delhi (1-Month) – Sep-2024

Purpose – Project alignment Training.

Recovery Executive | [Shriram City Union Finance]

Location —Karad

- Managed a portfolio of delinquent loans, recovering over 250+ customers of outstanding debts in a timely manner.
- Contacted borrowers via phone, email, and written correspondence to negotiate payment plans and resolve disputes.
- Worked closely with legal teams to initiate legal action when necessary, including preparing documentation for court proceedings.
- Maintained accurate records of all communications and recovery activities in CRM systems.
- Provided advice and guidance to customers on their loan repayment options, ensuring compliance with company policies.
- Conducted thorough investigations to locate borrowers and determine the financial status of individuals in arrears.

Sales Executive | [Fibernet ISP Pvt. Ltd.]

Location —Karad

- Develop and implement online sales strategies, resulting in a 12% increase in annual revenue.
- Handle inbound sales inquiries via email, live chat, and phone, converting 20% of leads into customers.
- Conduct thorough market research to identify trends, customer needs, and competitor activity.
- Create and execute effective email marketing campaigns that generated 23% increase in engagement and sales.
- Provide exceptional after-sales support, ensuring customer satisfaction and repeat business.

Business Development Manager | [HDFC Life Ltd.]

Location — Karad

- Assisted in lead generation and qualifying prospects for senior sales representatives, achieving a conversion rate of 20%.
- Managed inbound and outbound calls to explain policy details, update clients on changes, and upsell additional coverage.
- Coordinated meetings and presentations for sales reps, facilitating new business acquisition and client engagement.
- Kept up-to-date with the latest insurance products, industry trends, and competitors to provide clients with the most relevant and competitive offerings.
- Supported sales team in achieving overall departmental goals and client retention targets.

Relationship Manager | [Policy Bazar]

Location — Kolhapur

- Achieved and consistently surpassed sales targets by 80% through effective lead generation, networking, and building strong relationships with new and existing clients.
- Advised clients on the selection of insurance products, including life, health tailored to meet their individual needs.
- Built and maintained a strong pipeline of prospective clients, using CRM tools to track leads, schedule follow-ups, and ensure timely follow-through.
- Conducted detailed insurance needs assessments, explaining complex policy details to clients in a clear and understandable manner.
- Collaborated with underwriters to assess risk factors and tailor policies that meets both client and company standards.

- Delivered persuasive sales presentations, both in-person and via virtual platforms, to diverse audiences including individuals, families, and businesses.
- Closed an average of 60 deals per month, contributing to an annual sales revenue increase of 15%.
- Provided exceptional customer service, addressing inquiries, processing claims, and resolving issues to ensure customer satisfaction and retention.

Certifications

- UDEMY – Introduction to Financial Planning (CFP Certification)
- UDEMY – Customer Experience in Industry 4.0
- MSCIT

Educational Qualifications:

MBA – Business Analyst – 7.5 CGPA

Bachelor's Degree –Arts – 7.5 CGPA

HSC – 50%

SSC – 70.76%

LLB – Appearing

Personal Profile:

Name : Aakash Sathe

Marital Status : Married

Languages known : English, Hindi, Marathi

Hobbies: Bike Riding, Movie, Games, Driving

Permanent Address : Janardhan Residency, Banavdi Corner, Vidayanagar Karad - 415124

Phone No : +919767677313

Date of Birth : 7th Dec 1992

Declaration:

I hereby declare that the above-mentioned information is correct up to my

Knowledge and I bear the responsibility for the correctness of the above-mentioned particulars.

Place: Kolhapur -24

(Aakash Sathe)