

**Pankaj P. Rathi**

Mobile No: +91 9370932600 / Alt. No: - 7083935145

E-mail ID: [Pankajrathi707@gmail.com](mailto:Pankajrathi707@gmail.com)

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**CAREER OBJECTIVE:**

To be a part of the organization which recognizes and rewards loyalty, honesty, hard work and ambitions of an employee by providing growth opportunities and necessary infrastructure that could contribute to the success of company. I would like to build my career in customer services.

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**Work Experience: - Approx > 4 yrs**

- 1) **Name of Firm** : Finacc Services, (Prop.:-Vikram Kumbhar & Co), Pune  
**Designation** : Sr. Service Executive (Accounts Handler)  
**Duration** : Sep'2016

Currently I am dealing with back end tasks connected to the process which will be related to clients 'satisfaction by fulfilling their requirements. This will help us to retain the clients for long run in future and to maintain the healthy customer relation as I am part of PR (Public Relation) team.

**Job Responsibilities:**

1. In the capacity of PR(Public Relation) team member, dealing with direct clients in their query resolution regarding their customers and other data entry parts.
2. Initiate the mail reminders to all 97 clients regarding their monthly Data requirements schedule.
3. Maintaining reports for their tax paid since last 5 yrs and GST returns details.
4. Checking and Verification of Data provided by clients and forwarding the same further to execution team for processing.
5. Handling Bank records of every clients so that it will be easily accessible on requirements.
6. Assist the clients by handling their multiple calls and mails by replying them throughout the day.
7. Maintaining the accounts up to date on tally software for very client and invoicing for them.

- 2) **Name of Organization** : Gallagher Operations Support Services, Pune  
**Designation** : Process Analyst  
**Duration** : January 2015 to May 2016

I dealt with all the services that we provide to the clients on daily basis. Viz. AP, AR, Bank Reconciliation and handling customer grievances etc.

**Job Responsibilities:**

1. Analyzing the client requests in past and forecasting the fund requirements and making the provisions accordingly to meet the SLA's
2. Smooth delivery of Client fund requests.
3. Handling and solving Client queries satisfactorily.
4. Performing peer-to-peer check on the documents processed by colleagues to eliminate any incorrect payments
5. Preparing analysis reports on monthly basis showing payments summary and any shortfall of payments.
6. Conducting training and grooming new team members.

- 3) **Name of Organization** : BHR Multistate Credit Co-Operative Society, Pune  
**Designation** : Process Associate  
**Duration** : September 2011 to November 2014

Maintaining good customer relationship in segment of AR, AP & customer satisfaction on daily basis.

**Job Responsibilities:**

1. Financial Reporting, Calculation of Branch NAV and Customers' AR, AP & Reconciliation and handling clients query.
2. Handling all branch transactions of A/C receivables in terms of loan given to customer when their installment due.
3. Handling AP transaction on R.D. and F.D. interest due
4. Calculation of comparative profit and loss statement and comparative ratios.
5. Financial reporting to H.O. informing about branch performance.
6. Worked on analysis of content of annual report.
7. Reconciliation part with branch to branch and with other banks.

**Educational Qualifications:**

Course Particulars	Name of Institutes	Board /University	Passed Year	Class
M.B.A.	JSPM Campus,Pune	Pune University	2012	64%
M.Com	Pune University	Pune University	2014	59%
B.Com	G.S.college, Nagpur	Nagpur University	2006	52%
H.S.C	S.F.L.High school, Dhamangaon	Maharashtra Board	2003	67%
S.S.C.	S.F.L.High school, Dhamangaon	Maharashtra Board	2001	67%

### **Other Qualifications:**

1. Tally ERP 9.0
2. MS-CIT

### **Strengths:**

- Stead fast, flexible for adopting new ideas and continuous learning attitude.
- Hard working, Analytical ability.
- Decision making,
- Positive attitude.
- Good communication skill.

### **Personal Details:**

**Father Name** : Purushottamji M. Rathi  
**Permanent Address** : In front of Nehru Garden, Dhamangaon – 444 709  
**Phone No.** : 9370932600 / 7083935145  
**Date of Birth** : 1<sup>st</sup> Nov 1985  
**Language Known** : Marathi, Hindi, English.  
**Hobbies** : Traveling, listen Music  
**Current Address** : Sainath Nagri, Chandan Nagar, Pune, Nagar highway, Pune  
: Have handled my own business immediate after my graduation  
& taking some private tuitions currently.