**Lakshay Lalchandani**

**Mobile:** 09871707610

**Email id:** [lalchandanilakshay@gmail.com](mailto:lalchandanilakshay@gmail.com)

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**Objective**: To achieve professional excellence and growth in a challenging career in line with organizational growth and maximize my potential in providing financial advice and services to clients.

**Location Preference:** Delhi NCR

***Academic and Professional Credentials***

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| **Qualification** | **University/Board** | **Institute’s Name** | **Year** | **Percentage** |
| Certificate in the Webinar on How to Save Tax using Market Linked ELSS | Securities and Exchange Board of India | National Institute of  Securities Markets | 2025 | 100% |
| Tally ERP 9 | New Delhi YMCA | Institute for Office Management | 2024 | 78% |
| Certificate in the Webinar on Investment Banking | Securities and Exchange Board of India | National Institute of  Securities Markets | 2024 | 100% |
| Certificate in the Webinar to Fixed Income Securities | Securities and Exchange Board of India | National Institute of  Securities Markets | 2024 | 100% |
| Certificate in the Webinar on Bonds Jargon Simplified | Securities and Exchange Board of India | National Institute of  Securities Markets | 2024 | 100% |
| Business Writing Principles | Linkedin Learning | CBRE Talent Coach | 2024 | 100% |
| Excel 2016: Managing and Analyzing Data | Linkedin Learning | CBRE Talent Coach | 2024 | 100% |
| Excel: PivotTables for Beginners | Linkedin Learning | CBRE Talent Coach | 2023 | 100% |
| Learning Excel 2016 | Linkedin Learning | CBRE Talent Coach | 2023 | 100% |
| Certificate of Associated Persons in the Securities Markets | Securities and Exchange Board of India | National Institute of  Securities Markets | 2017 | 62% |
| Post Graduate Diploma in Banking and Finance | TKWs Institute of Banking and Finance | TKWs Institute of Banking and Finance | 2017 | 61% |
| Batchelor of Commerce | Delhi University | School of Open Learning | 2016 | 43% |
| 12th | CBSE | Father Agnel School | 2013 | 56% |
| 10th | CBSE | Father Agnel School | 2011 | 55% |

***Post Graduate Diploma in Banking and Finance in following subjects***

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* General Banking Operations, Financial Products, Banking Maths, Basic Accounts, Basic Computers,

Project Submission, Selling Skills, Professional Banking Communication, Insurance, Asset Banking,

Derivatives, Power Point Marketing of Financial Products, Banking Law, Customer Service,

International Trade Finance, Financial Advisory.

***Technical Skills***

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* Basic knowledge of Ms Office (MS WORD, MS EXCEL,MS POWER POINT)

***Hobbies***

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* Net Surfing
* Watching entertainment show
* Playing Football

***Professional Experience***

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1. **Working as a Help Desk Executive for Optum Global Solutions India Private Limited at Coldwell Banker Richard Ellis (CBRE) South East Asia Private Limited from October 1 2022 till May 10 2024.**

*Role and Responsibilities at Coldwell Banker Richard Ellis (CBRE) South East Asia Private Limited*

* Facilitating quick resolution to employee’s facility related complaints and requests through email.
* Processing the requests/complaints based on the pre-defined priorities and respective response timelines through calls and Work order management system pertaining to specific site issues.
* Incident management for emergency events causing damage related to the business, resource or significantly compromising customer service operations being informed by the specific site including Fire alarm, UPS tripping, Loss of power etc.
* Assistance for event management requests related to “Special Events” (Offsite) and “Events” (at the site) for site visit for various workspaces within the facility in the premises.

1. **Worked as a Facility Executive Soft Services for Optum Global Solutions India Private Limited from July 26 2022 till September 30 2022 at Jones Lang Lasalle Property Consultants Private Limited (JLL) on Genius Consultants Payroll**

*Role and Responsibilities at Jones Lang Lasalle Property Consultants Private Limited (JLL)*

* Providing assistance related to work place safety, cleaning and security for enhancing productivity and offering solutions for problems or issues within Facility Operations and Management.
* Monitoring inventory storage for consumables by issuing Purchase Orders.
* Maintaining Purchase order obtained from Procurement team for various materials.
* Consumption of items being maintained through Monthly Requisition Tracker.

**3.) Working as an Executive at Japanese Corporate Bank- Mitsubishi UFJ Financial Group Bank (MUFG Bank) from December 2 2020 till March 14 2022 on Pasona India Payroll**

*Role and Responsibilities at Japanese Corporate Bank- Mitsubishi UFJ Financial Group Bank (MUFG Bank****)***

* Provide support/inputs to superior in jobs related to the department, to help improve productivity.
* Handling customer queries, booking of FD and loan deals, dealing with the security documents like Indemnity bond, sanction letter etc.
* Managing the main operations of majority of Bank’s customers, and provide services like Bank guarantees, Import/ Export payments(A1& A2), various Trade Finance activities like COB, L/C, GR waiver, BOE etc
* Manual file sharing and Data Entry.

**4.) Worked as a Trainee at Epoch Insurance Brokers Private Limited from May 15 2019 to March 15 2020**

*Role and Responsibilities at Epoch Insurance Brokers Private Limited*

* Managed billing and compliance by reconciling the balances.
* Worked in service department by maintaining and preparing all the documents related to policies maintaining and creating record in the system and also generating the certificates of client from general insurance company portal.
* Prepared proposals of the client in excel by generating the quotes of the client from life insurance company portal according to the mentioned particulars of the client in underwriting.
* Worked in accounting department at Manoj Sangeeta and Associates (client Epoch Insurance Brokers Private Limited) by passing sales and purchase entries in Tally, applying features of Tally using shortcut keys and generating GST returns from GST portal from 14th October 2019 to 31st December 2019.
* Maintaining data in excel sheet from remuneration invoice of insurance companies and also verifying the GSTIN of insurance companies from GST portal.
* Maintaining bank payments, receipts and conveyance and journal vouchers and updating expense sheet.

**5.) Worked as a Claims Associate at Optum Global Solutions Pvt. Ltd. from February 18 2019 to May 2 2019**

*Role and Responsiblities at Optum Global Solutions Pvt. Ltd.*

* Provide expertise or general claims support by reviewing, researching, investigating, negotiating, processing and adjusting claims.
* Analyze and identify trends and provide reports as necessary.
* Consistently meet established productivity, schedule adherence and quality standards.
* Ability to thouroughly review, analyze and research complex health care claims in order to identify discrepancies, verify pricing, confirm prior authorizations and process them for payment.

**6.) Worked as a Business Development Associate at Franklin Templeton Asset Management (India) Pvt. Ltd. from January 1 2018 to May 31 2018**

*Role and Responsibilities at Franklin Templeton Asset Management India Private Limited*

* Managing the sales with tagged Independent Financial Advisors.
* Developing the business of Franklin Templeton Asset Management Investments Limited in the designated region for managing the designated distributors.
* Providing assistance by resolving the complaints and disputes of Unit Holders under the ARN code of designated distributors.
* Meeting the existing distributors for mutual fund sales.

## Personal Vitae

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**Father’s Name :** Mr. Mohan Lalchandani

**Correspondence Address** **:** 81, Ground Floor, National Park, Lajpat Nagar-4, New Delhi-110024

**Permanent Address** **:** 81, Ground Floor, National Park, Lajpat Nagar-4, New Delhi-110024

**Date of Birth** **:** 06/03/1995

**Languages Known** **:** English & Hindi

**Date: - Signature: -**