



Osama Mehmood

Date of birth: 25/10/1993 | **Nationality:** Pakistani | **Gender:** Male |

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ABOUT ME

Organized and dependable candidate successful at managing multiple priorities with a positive attitude. Willingness to take on added responsibilities to meet team goals.

WORK EXPERIENCE

01/01/2021 – 31/07/2023 Rawalpindi, Pakistan

REGIONAL WEALTH MANAGER (AVP) UNITED BANK LIMITED

Major Requirements & Responsibilities

- Generate Bancassurance premium and mutual funds AUM, ultimately enhancing revenue for the region and overall bank.
- Close coordination with region's team, operations, product & CBC and external stakeholders – insurance companies and UBL Funds managers.
- Ensure periodic trainings of all BMS, DMs and RMs with certification/refreshers for bancassurance & Mutual Funds.
- Ensure insurance company's representative in the branch is certified and have job card when in branch.
- Support sales and help distribution to solicit new business, strategize sales at branch level for bancassurance and Mutual Funds.
- Monitor performance vs. targets, health of regional bancassurance portfolio with respect to persistency and cancellations, monitoring per branch productivity for bancassurance & Mutual Funds.
- Follow TAT for complaint resolution and coordinate with stake holders.
- Ensure forwarding to issuance of cases is 10% and ensure timely delivery of all policy documents

03/01/2017 – 31/12/2020 Rawalpindi, Pakistan

BUSINESS DEVELOPMENT OFFICER, BANCASSURANCE UNITED BANK LIMITED

Major Requirements & Responsibilities

- Regular branch visits for facilitation to the branch staff for banca related matters.
- Banca performance vs. target tracking of branches.
- Close coordination with branch staff for business development.
- Arrangement of periodical training for staff in coordination with insurance company under intimation to the product team at HO & to ensure all banca sales staff complete their certification trainings.
- Problem resolution in coordination with all stakeholders.
- Close coordination between Banca Ops/Product team/CBC team and branches to ensure smooth processing.
- Coordination between Complaint Resolution Unit and branches for resolving customer complaints or complaints highlighted by SBP/BMP/SECP.
- Assist in claim processing with the help of relevant stakeholders.
- Close coordination and regular interaction with regional insurance representatives.

08/08/2015 – 31/12/2016 Rawalpindi, Pakistan

MANAGEMENT INFORMATION SYSTEM COORDINATOR (MIS) UNITED BANK LIMITED

Major Requirements & Responsibilities:

- Managing and executing Management Information Systems (MIS)
- Handling hiring and performance management processes.
- Responsible for devising and implementing policies to ensure collaboration among departments, strategic management and middle office operations.
- To provided executive support to the Regional Business Head in various professional tasks. This includes booking monthly meetings, often with team leaders, field staff, and clients, even in challenging time zones.

● EDUCATION AND TRAINING

01/09/2012 – 15/01/2015 Rawalpindi, Pakistan

BACHELOR OF COMMERCE University of Punjab, Lahore

15/09/2010 – 15/10/2012 Rawalpindi, Pakistan

INTERMEDIATE IN COMMERCE BISE Rawalpindi

01/09/2008 – 09/09/2010 Rawalpindi, Pakistan

MATRICULATION BISE Rawalpindi

2016 Rawalpindi, Pakistan

BASIC BANKING COURSE United Bank Limited

2016 Rawalpindi, Pakistan

MS - EXCEL INTERMEDIATE TO ADVANCE United Bank Limited

Rawalpindi

IT ADVANCE AGT Institute of Technical & Professional Education Rawalpindi.

● LANGUAGE SKILLS

Other language(s): **ENGLISH | HINDI | ARABIC | URDU**

● ADDITIONAL INFORMATION

ORGANISATIONAL SKILLS

Skills

- Business Management
- Strategic Planning
- Team Building & Management
- Business Analysis
- Team Training and Development
- Client Relationship Management
- MS Office
- Problem solving abilities & Critical Thinking
- Time Management & Multitasking Ability
- Customer Service
- Positive Thinking Approach
- Independent and Group Work Proficiency

REFERENCE

REFERENCES: Can provide Once requested.
