

# YUSAF R M



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## Objective & Executive Summary:

To enhance the performance of the organization for better output through a disciplined, organized, and progressive ways with my sincerity, creativity, hard work and utmost endeavors in the task entrusted to me.

### **Max Life Insurance- Thrissur,Kerala-India** **Financial Sales Manager (Oct 2024 - Current)**

- ✓ Need to cross sell various life insurance products to the customers through bank channel.
- ✓ Conduct training for employees.
- ✓ Drive primary sales in mapped branches.
- ✓ Coordinate visibility activities.

### **PNB Metlife- Thrissur,Kerala-India** **Relationship Manager Banca Assurance (Feb 2023 - Sep 2024)**

- ✓ Assist Specified Person to generate leads and login prospective applications.
- ✓ Meet Monthly Life Insurance sales target.
- ✓ Driving the bank SP, logging in applications sourced, through operations department.
- ✓ Adhering to PNB MetLife policies and providing need based selling support.

**ICICI BANK Pvt Ltd (IProcess Services India Pvt Ltd)-Edappilly,Cochin Kerala  
Home Loan Sales Executive ( Oct 2021 to Feb 2023)**

- ✓ Accurately maintained records of home loans and ensured all documentation and paper work was in place and within compliance.
- ✓ Assisted clients with various questions and concerns related to their mortgage.
- ✓ To ensure proper customer profiling on each call/customer visit, to identify and understand their needs and accordingly recommend home loan options.
- ✓ Relationship building with the Home Loan Executives to ensure maximum attachments of the files being disbursed.
- ✓ To interact with credit and operations departments with regards to sanction and disbursement of loans.
- ✓ Assisted customers by selling and cross- selling loan products while controlling and supervising large amounts of cash and maintaining customers' accounts.

**Unimoni Financial Services Ltd-Guruvayur Thrissur, Kerala-India  
Cashier (Sep 2018 - Sep 2021)**

- ✓ Interacted with waves of customers on regular basis answered customers questions and provided information on procedures monitored check out stations to ensure that they are staffed appropriately.
- ✓ Assisted customers with daily cash inquiries which includes accepting credit slip and sorting of cheques.
- ✓ Handling complaints and requests from customers and resolving the issues.
- ✓ Prepared payments by verifying documentation and created reports of all invoices received from deliveries at the end of shift.
- ✓ Responsible for cash register duties and make sure cash proves at the close of the business day.
- ✓ Established, developed, and maintained client referral relationships with potential and existing customers.
- ✓ Collaborated with colleagues to exchange selling strategies and marketing information.

**Education:**

B.Com with Finance from University of Calicut (2012-2015)

**Technical Skills:**

Customer Relationship Management.  
Accounting - Tally ERP, Tally Prime  
Office & Secretarial Skills: MSOffice.

**Licenses:**

Valid Light Motor Driving License

India

**Personal Details:**

Nationality : Indian  
Date of Birth : 06/04/1995  
Passport No : N1944788

**Languages:**

English, Hindi, Tamil, Malayalam.

**References:**

Upon Request.