

Mr.VINOD SURVE

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Expand my knowledge and experience of cooperate management and invoicing process in a constant learning environment while working for a stable company with a good reputation.

Synopsis

- Dedicated management professional sales & good service, Billing process, Account payable process, Account Receivable management and material management.
- Willing to work for extensive Sales &. Service, billing, procurement expertise & Financial operations toward supporting the employer in optimizing bottom-line performance.

Work Experience

A.ICICI Prudential life insurance,

Designation- Sr Financial Service Manager.

Duration – August 2018 To Till Date.

Roll- Sales & Service -

- Financial Sales Profile - Provide on and off field support to branch employees.
- Providing need based “Financial planning for customers”.
- Acquiring knowledge and developing skills on products and process through E-learning modules.
- Establishing programs designed to retain existing member clients, trigger advance follow-up periods and regaining business that has lapsed
- Contribute thoughts for improving the sales and marketing efforts of this rapidly growing business
- Assisting clients in processing claims
- Quoting and preparing life insurance policies
- Preparing changes to life insurance policies including; change of beneficiary, change of ownership and upgrade in amount or type of policy
- Handling inbound/outbound calls and answering questions from members interested in life insurance and financial products

B.Matrix Business India Pvt. Ltd

Project - Canon India Pvt. Ltd.

Designation – Sr Executive

Duration – Jan 2017 To Dec 2017

Roll –Account Payable

- Account Payable Process
- Account Reconciliation
- Bill Verifications
- Monthly Report & MIS
- Vendor Management

Roll- Account Receivable

- Perform billing, payment allocation, collection and activity reporting following established Protocols, to tight deadlines for West region.
- Perform billing on ESD - Direct Sales to customer.
- Complete accounts reconciliations and process adjustments.
- Maintain up to date billing system and customer files.
- Monitoring for ACTIVE MIF (Machines in Field) located at West region.
- Managing all major accounts (Reliance Group, Axis Bank, Ranbaxy, MetLife and TCS etc.)
- Monitor customer account details and identify and investigate non-payments, delayed Payments

And other irregularities.

- Organize recovery system and initiate collection efforts.
- Preparing the major outstanding report of customer.
- Investigate and resolve customer queries.
- Prepare bank deposits on day to day basis.

C . Thyrocare Technologies Ltd

Designation – Executive

Duration – Feb 2015 To Dec 2017

Account Payable

- Match purchase orders to invoices and enter invoices into computer
- Reconcile processed work by verifying entries and comparing system reports to balances
- Charge expenses to accounts and cost centers by analyzing invoice/expense reports and recording entries
- Pay vendors by monitoring discount opportunities, verifying federal id numbers, scheduling and preparing checks, resolving purchase order, contract, invoice, or payment discrepancies and documentation; insuring credit is received for outstanding memos, issuing stop-payments or purchase order amendments
- Pay employees by receiving and verifying expense reports for advances; preparing checks
- Maintain accounting ledgers by verifying and posting account transactions
- Verify vendor accounts by reconciling monthly statements. Enter new or update vendor names and data
- Report sales taxes by calculating requirements on paid invoices
- Provide accurate and effective document preparation and records management relative to the AP function in accordance with records retention policies and procedures
- Protect organization's value by keeping information confidential
- Update job knowledge by participating in educational opportunities

D. Sawant Competitive Exams Training Centre

Designation- Administrator.

Durations - Jan 2012 to Dec 2014

Profile –

- handling correspondence
- organising and servicing committee and academic board meetings (producing agendas, taking minutes etc)
- researching and writing reports
- preparing statistics and handling data, such as attendance figures
- processing invoices
- purchasing equipment/other goods
- liaising with potential students, other institutions, government departments and external organisations

- helping with course approval and evaluation activities
- formulating and implementing regulations/policies
- timetabling and planning events
- administering and coordinating student recruitment, examinations and assessment activities
- All lectures with weekly planning
- Payment Received
- Conduct Exams and guide
- Admin activities

Social Achievements

Secretary at Rising youth Foundation 2016-17 Till Date
Arranged multiple social events in society.

Credentials

Year of Passing/Pe rsuing	Qualification	Institute	Board / University	Grade
2018-19	MBA in Marketing & Sales	Welinker Institute of Mumbai	University of Mumbai	Persuing
2011-12	Bachelor of Commerce	Vartak college, Vasai	University of Mumbai	II
2008-09	Higher Secondary Certificate	YCS College	University of mumbai	I
2006-07	Secondary School Certificate	Prabhat HighSchool	Maharashtra State Board	II

Professional Competencies

- Understanding of import and export business model.
- Knowledge of procedures of supply chain and logistics.

Computer Competencies

- Typing speed (40 wpm)
- Proficiency in MS- Office
- Internet Savvy

Personal Dossier

- Date of birth : 11th September 1990.
- Languages Known : English, Marathi, Hindi
- Hobbies : Listening music & travelling

Declaration

I hereby declare that the above stated information is true to best of my knowledge.

Place:

Date:

Vinod Surve