

SWAPNODEEP GHOSH

Relationship Manager – Asset Management & Wealth Distribution

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PROFESSIONAL SUMMARY

MBA (Marketing) professional with 3+ years of experience in financial services, asset management, and B2B sales. Proven expertise in distributor relationship management, mutual fund sales, client acquisition, and revenue generation. At HSBC Asset Management, drove product penetration across territory through distributor training, investor awareness programs, and portfolio advisory. Ranked #1 nationally at Tata AIA for highest client conversion. Seeking a Relationship Manager role to leverage deep market knowledge, consultative selling, and distribution strategy in a high-growth asset management environment.

WORK EXPERIENCE

Manager – Sales & Distribution | HSBC Asset Management India | Kolkata | Jan 2025 – Aug 2025

- Managed and deepened distributor relationships across assigned territory to drive mutual fund AUM growth and sales targets.
- Conducted product presentations, distributor training sessions, and investor awareness programs to enhance brand visibility and advisor engagement.
- Advised distributors on asset allocation, portfolio alignment, and focused selling strategies to increase product penetration and wallet share.
- Developed competitive counter-strategies leveraging market intelligence, scheme performance data, and industry trends.
- Ensured full adherence to SEBI/AMFI regulatory compliance and internal operational guidelines.

Chat Sales Associate | TTEC | Kolkata | Feb 2022 – Mar 2023

- Handled real-time sales interactions for international clients, exceeding targets via consultative selling and objection handling.
- Maintained high CSAT scores; managed lead qualification, CRM documentation, and cross-functional coordination.

Senior Business Development Executive | Unacademy | Kolkata | Jan 2021 – Dec 2021

- Generated ₹80 lakhs in revenue within 12 months through structured consultative sales approach and proactive pipeline management.
- Achieved highest weekly revenue of ₹2.5 lakhs in the vertical; consistently exceeded monthly targets.

Relationship Manager | Tata AIA Life Insurance Co. Ltd. | Kolkata | Aug 2018 – Sep 2019

- Ranked #1 in India for highest client conversion percentage (Jan–Mar performance cycle) across the bancassurance channel.
- Acquired and converted salary-account customers into insurance clients through targeted cross-selling and needs-based financial planning.
- Delivered customized financial solutions, improving client retention, premium compliance, and policy persistency.

CORE COMPETENCIES

– Distributor Relationship Management	– Mutual Fund & AUM Sales	– Client Acquisition & Retention
– Portfolio Advisory	– Revenue Growth & Target Achievement	– Market Intelligence & Analysis
– Investor Awareness Programs	– Consultative & Needs-Based Selling	– SEBI/AMFI Compliance
– CRM Tools & Reporting	– MS Excel & PowerPoint	– Negotiation & Objection Handling
– Excellent Communication Skills	– Strong Interpersonal Skills	

EDUCATION

MBA (Marketing) — First Class (Grade A) | Bengal Institute of Business Studies | 2023–2025

B.A. (Hons) Mass Communication — Second Class | University of Calcutta | 2015–2018

CERTIFICATIONS

NISM Series VA – Mutual Fund Distributors Certification | NISM (National Institute of Securities Markets)

ADDITIONAL INFORMATION

Languages: English, Hindi, Bengali | **Interests:** Reading, Basketball, Swimming