

Certificate Program on Banking, Finance & Insurance



**(C. P. & Berar E.S. College launched CPBFI online course
under CSR of Bajaj Finserv Company)
1st BATCH**



**Organized by
Department of Commerce,
C.P.& Berar, E. S. College, Nagpur**

**Date – 10 Aug 2019
Duration – 45 Days**

Objective - The objective of CPBFI is to impart practical knowledge and essential skills to final year graduation students and fresh graduates, especially those belonging to economically weaker sections of the society, with a view to create employment opportunities for them in the Banking, Finance and Insurance Companies.

INTRODUCTION

C. P. And Berar College had launched CPBFI (Certificate Program on Banking, Finance and Insurance) course under CSR of Bajaj Finserv Company, which was inaugurated on 10 Aug 2019. The first batch of course was of 45 days duration and had provided training on Banking, Insurance, Finance and Emotional Intelligence. The course had been conducted by the college for the last three years and many students have taken advantage of it. (Now that college is getting over, your future depends on what kind of job you do. While the degree has trained you up for the basics of all jobs, you need to be more focused on what you want to do.

The companies today, look for 3 major things: Dedication, Knowledge and Clear Communication. While we know you are dedicated, to improve your knowledge and communication, we have tied up with Bajaj Finserv, for a Certificate Program in Banking, Finance and Insurance – CPBFI. This program will train you to become a professional for the Banking, Finance and Insurance industry. The program has a mix of communication skill training, industry knowledge and working and interview experience workshop.

It will be held online, and industry professionals – from banks and insurance companies will teach you the subjects. You will also get an end-to-end interview experience of an actual interview, with feedback and points to work on. This program will increase your confidence, communication level and knowledge, giving you an edge to get a job. The inauguration program was attended by the Principal of the college, Dr. Milind Barhate, Lead Trainers, as well as Coordinator Dr. Medha Kanetkar.

ABOUT CPBFI

CPBFI is a customized training program conducted by Bajaj Finserv for graduates, especially the first-generation graduates, across India. CPBFI aims to make these graduates employable for the Banking, Financial Services and Insurance (BFSI) sector. As per industry estimates, less than 50% of the graduates passing out of the colleges are ready for corporate roles. This poses challenges for graduates aspiring for a successful career and for industry looking for skilled employees. CPBFI aims to solve this dual challenge.

CPBFI is a 100-hour training program designed by Bajaj Finserv in collaboration with industry experts, educational institutes and a leading mental health institute. CPBFI equips participants with the right attitude, skills and industry knowledge, thereby going beyond a typical skill development program. Successful participants can apply for different roles in banks, finance companies and insurance companies. CPBFI prepares participants for the challenging customer-facing roles in sales, service and operations which offer maximum career opportunities and excellent growth prospects.

CPBFI is conducted by a pool of trainers with extensive industry and training experience. The courses are delivered using an experiential-learning approach based on adult-learning principles. Students are able to participate in the discussions, role plays and other group activities where they can sharpen their own skills and knowledge. CPBFI is short, practical and affordable which makes it accessible to every student. This unique combination of content

and pedagogy makes CPBFI one of the best extra-curricular programs that a college can offer its students.

By partnering with Bajaj Finserv, colleges can not only enhance the career opportunities of the students, but also attract top companies to recruit from the college.

An industry partnership can benefit the college by improving its NIRF and NAAC rating and its rank in the Best College Rankings by the different agencies. CPBFI is exclusively available to students and alumni of Bajaj Finserv's partner colleges.

OBJECTIVE

The primary objective of CPBFI is to make fresh graduates employable by building their capabilities. Towards this end, we address all three aspects of employability - Attitude, Skills, and Knowledge or ASK. CPBFI content is designed with equal weightage on Skills and Knowledge and the pedagogy is designed with a view to improve the confidence of the participants through participative learning.

Employers typically hire for attitude by looking at the ability to take on challenges, willingness to learn new things, work as a team while being flexible about their job location and so on. However, for becoming truly employable, one needs to build all three capabilities in equal measure. For us employability is not just the ability to get hired but also to perform well in any given role. And this can be achieved only by building attitude, skills and knowledge.

CPBFI trainers come from the industry with extensive experience. Many of our trainers are also working professionals from leading banks and insurance companies' country. Our trainers are also reoriented to meet the specific needs of CPBFI students who are mostly in tier-2 and tier-3 cities and towns in the country. Apart from the practical training, by sharing their own experiences, these trainers become role models for the students aspiring for private sector jobs.

COURSE STRUCTURE

CPBFI involves fourty five days of training that covers three subjects, namely Communication Skills, Banking and Insurance. Online assessments are conducted before and after the training to measure the improvement in students. Finally, an HR workshop is conducted where the participants gain an end-to-end experience of the entire recruitment process from selecting a role to apply till the final job interview.

The interviews are conducted by recruiters from Bajaj Finserv companies so that by end of the CPBFI, the participants already have an experience of a top company interview. Students are provided personal feedback which is rarely available in real-life interviews.

CPBFI Courses and Structure

ATTITUDE

Course 1: Managing Self - ~~SwabBox~~

~~SwabBox~~ orientation
My Self
Self-belief – staying assertive
Mind-body connections and Self-talk
What are emotions
Regulating emotions
What is belief
ABC Principle of ~~BEST~~
Rational and irrational beliefs
Decision making
Daily challenges

SKILLS

Course 2: Communication and Workplace Skills

What is communication
Goals and barriers in communication
Modes of communication
Listening skills and empathy
Non-verbal expression skills
~~Summarisation~~ skills
Effective communication
Use of language in communication
Spoken communication
Telephonic communication
Written communication
Giving and receiving feedback
Saying and taking NO
Persuasion and influencing skills
Working in teams
Group discussion skills
Goals and targets at workplace
Representing self
Job interview techniques
Job interview demonstration

KNOWLEDGE

Course 3: Overview of Retail Banking

Introduction to Banking
Introduction to Branch Banking
Customers and Their Needs
Overview of Banking Products
Liability Products
Asset Products
Third Party and Fee-based Products
Business Development
Transaction Processing
Customer Service
Compliance and Ethics
Future of Banking
Inclusive Banking
Introduction to NBFCs
Overview of Corporate Banking
Banking and Me

KNOWLEDGE

Course 4: Overview of Insurance

Need for Insurance
Evolution of Insurance
Overview of an Insurance Company
Overview of Retail Insurance Products
Overview of the Companion Products
Overview of Insurance Distribution Channels
Selling Insurance
Insurance Operations
Customer Service
Ethics and Compliance in Insurance
Future of Insurance
Inclusive Insurance
Profitability Drivers for Insurance

Mock interviews by
corporate recruiters

Classroom Only



96 hrs over 30 days

Online Only



96 hrs over 46 days

MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (hereinafter referred to as the "MOU") is made and executed on this 18th day of June 2019 at Pune.

BETWEEN

C.P and Berar College, a college/Institute recognized under Section 2(f) and 12 (B) of the UGC Act 1956 and having address at: Tulsibag, Mahal, Nagpur, 440032, Maharashtra, India

Through its Principal

(hereinafter referred to as "PARTNER INSTITUTE")

AND

BAJAJ FINSERV LIMITED, a company registered under the provisions of the Companies Act, 1956, having its registered office at: Bajaj Auto Ltd Complex, Mumbai-Pune Road, Pune 411 035

AND

BAJAJ FINANCE LIMITED, a company registered under the provisions of the Companies Act, 1956, having its registered office at: Akurdi, Pune 411 035

Through President (Legal and Taxation) – Bajaj Finserv Limited

(hereinafter referred to as "FINSERV")

The expressions "PARTNER INSTITUTE" and "FINSERV" shall, collectively be referred to as "Parties" and individually as "Party".

WHEREAS:

- A. PARTNER INSTITUTE established in 1960 by C.P. and Berar Education Society is affiliated to R.T.M. Nagpur University, Nagpur.

- B. Bajaj Finserv Limited is the holding company for financial services businesses of the Bajaj Group;

- C. Bajaj Finance Limited is a Non-Banking Finance Company registered with Reserve Bank of India.

- D. FINSERV, as part of its Corporate Social Responsibility (CSR) activities, desires to create employment opportunities for educated youth in the Banking, Finance and Insurance Sector through a customized training programme encompassing product knowledge, communication and other soft skills & computer proficiency, which is expected to benefit fresh graduates, especially those belonging to economically weaker sections of the society;

- E. FINSERV, in partnership with a leading management school in India, has designed and developed a customized programme viz. Certificate Programme in Banking, Finance and Insurance (hereinafter referred to as CPBFI).

- E. The PARTNER INSTITUTE has expressed its willingness to partner with FINSERV to conduct CPBFI for its students and alumni, on terms and conditions set out herein below;

- F. FINSERV has accepted the offer of the PARTNER INSTITUTE and agreed to partner with the PARTNER INSTITUTE for conducting CPBFI, on terms and conditions set out below.

NOW THIS AGREEMENT WITNESSETH AND IT IS AGREED BY AND BETWEEN THE PARTIES AS UNDER:

1. Purpose/Objective of CPBFI:

The objective of CPBFI is to impart practical knowledge and essential skills to final year graduation students and fresh graduates, especially those belonging to economically weaker sections of the society, with a view to create employment opportunities for them in the Banking, Finance and Insurance Companies.

2. Scope of CPBFI:

- i. FINSERV has appointed different training institutes as Official Training Partners for conducting CPBFI (hereinafter referred to as CPBFI Official Training Partners).
- ii. FINSERV and the PARTNER INSTITUTE, through one of the CPBFI Official Training Partners, shall conduct, for the eligible students and alumni of the PARTNER INSTITUTE, a Certificate Programme in Banking, Finance and Insurance viz. CPBFI, covering industry overview and product knowledge about Banking, Financial Services and Insurance (BFSI) industry, communication skills and computer proficiency.

3. Responsibilities of the Parties:

- i. The PARTNER INSTITUTE shall be responsible for mobilizing students for the CPBFI Programme by spreading awareness about CPBFI and its potential benefits for the prospective students. FINSERV shall support the awareness campaigns by participating in the student meetings, parent meetings and design of publicity material such as posters, leaflets etc.
- ii. The PARTNER INSTITUTE shall be responsible for providing necessary infrastructure facilities for conducting CPBFI, specifically (a) one class room, equipped with a projector, a sound system and a white-board and (b) one computer room, equipped with computers having MS Office software and high-speed internet connection, both with a seating capacity of minimum 40 students. PARTNER INSTITUTE shall also provide basic stationery required for training purposes such as marker pens, chart sheets, chalks etc.
- iii. The PARTNER INSTITUTE shall appoint a Coordinator for every CPBFI batch, with following responsibilities;
 - a. To motivate and encourage students to extract maximum benefit from CPBFI
 - b. To ensure that the classes are conducted as per pre-defined schedule
 - c. To ensure that all students are regularly attending the classes
 - d. To provide necessary support to the CPBFI Official Training Partner for planning and conducting the program
 - e. To attend few classes as an observer and provide feedback to FINSERV about the training quality
 - f. To ensure discipline and good conduct from the students
- iv. FINSERV shall be responsible to arrange faculty, with requisite expertise and experience, through any of its CPBFI Official Training Partners. FINSERV shall provide necessary details of the concerned CPBFI Official Training Partner to the PARTNER INSTITUTE at least 2 weeks before start of every batch.

- v. FINSERV and the PARTNER INSTITUTE, shall be responsible for award of “Certificate of Completion” at the completion of CPBFI to all successful candidates who meet eligibility criteria viz. requisite attendance and credits in the examinations conducted during the course of CPBFI.
- vi. FINSERV, as part of its CSR, shall bear the full cost of faculty deployed by its CPBFI Official Training Partner, to ensure that CPBFI is affordable to students belonging to economically weaker sections of the society.
- vii. FINSERV along with its chosen academic partner/s, shall conduct an online examination at the end of CPBFI. Only students who pass this examination shall be eligible to receive the “Certificate of Completion”. This examination shall be in addition to all other examinations conducted by the CPBFI Official Training Partner during CPBFI.
- viii. The PARTNER INSTITUTE shall display the FINSERV name and logo prominently in all marketing and publicity material, notices for students and all other internal and external communications, in paper form or otherwise, relating to CPBFI.
- ix. Any other use of FINSERV brand names by the PARTNER INSTITUTE shall require prior written consent from FINSERV.
- x. The PARTNER INSTITUTE shall provide to FINSERV, necessary information about all the students of CPBFI, in the format specified by FINSERV in Annexure 1. FINSERV shall be free to contact the students directly for the purpose of monitoring the impact of CPBFI and the career progression of students.
- xi. The PARTNER INSTITUTE shall not conduct CPBFI or a programme with identical course structure except in partnership with FINSERV.
- xii. The PARTNER INSTITUTE shall be solely responsible to comply with regulations of University Grants Commission or any other authority regulating educational activities in India. The PARTNER INSTITUTE agrees that FINSERV shall not have any liability including monetary or otherwise, in the event of any regulatory action taken against the PARTNER INSTITUTE in respect of conducting this programme. The PARTNER INSTITUTE agrees to fully compensate FINSERV in case an action is taken against FINSERV by any such regulatory authority in respect of conduct of CPBFI by the PARTNER INSTITUTE under this MoU.
- xiii. The PARTNER INSTITUTE shall be solely responsible for payment of GST or any other taxes that may be applicable, in respect of fees collected by the PARTNER INSTITUTE for CPBFI and FINSERV shall not have any liability towards the same. The PARTNER INSTITUTE agrees that FINSERV shall not have any liability, monetary or otherwise, in the event of any action is taken against the PARTNER INSTITUTE by any tax authorities. The PARTNER INSTITUTE agrees to fully compensate FINSERV in case any action is taken against FINSERV by any such tax authority in respect of conduct of CPBFI by the PARTNER INSTITUTE under this MoU.
- xiv. The PARTNER INSTITUTE shall submit the information specified in Annexure 3 before commencement of every batch to FINSERV.

4. Batch Strength:

The parties agree that, each batch shall consist of minimum 30 and maximum 45 students. FINSERV and the PARTNER

INSTITUTE may mutually decide to start a batch with less than 30 students.

5. Term of the Agreement:

The term of this MOU is for 3 years commencing from June 1, 2019, except Clause 3(xi) and Clause 14, which shall continue to be in force for a further period of 3 years from the date of termination of this MoU. The parties may decide to further extend the term of this MOU by mutual consent on such terms and conditions as may be agreed between them.

6. Course fees:

- i. PARTNER INSTITUTE shall charge a non-refundable fee of Rs. 1,000 (Rupees one thousand only) to each of the students of CPBFI towards the course fees inclusive of GST and other taxes. The fee payable by each student shall not exceed Rs. 3,000 (Rupees three thousand) plus applicable taxes. The fees specified here shall be valid for two years from signing of this MoU. The fees shall be reviewed on completion of this period and parties may mutually agree to revise the same from time to time.
- ii. On successful completion of every batch i.e. If the overall attendance of the students is in excess of 75%, FINSERV shall pay an amount of Rs. 500 (Rupees Five Hundred only) per student to the PARTNER INSTITUTE as a fee subsidy. This subsidy shall be used by the PARTNER INSTITUTE to remunerate the coordinator for his/her effort. The fee subsidy shall be paid by FINSERV within 2 weeks from completion of every batch. The method for calculating the overall attendance is included in Annexure 2.
- iii. The PARTNER INSTITUTE shall ensure that no student shall be allowed to attend CPBFI without paying the full fees.
- iv. The PARTNER INSTITUTE shall submit to FINSERV, before commencement of any batch, extracts of bank statement or copies of cash receipts or a letter from the Principal or Vice-Principal confirming collection of fee from every participant.

7. Duration and contents of CPBFI:

- i. CPBFI shall commence from July 2019. The said Programme will be of about 8-week duration and will involve class room teaching of about 120 hours.
- ii. The PARTNER INSTITUTE has agreed to mobilize, on best effort basis, at least 40 students in first academic year and at least 80 students from second academic year onwards. The PARTNER INSTITUTE shall decide the batch schedule and timings and inform the schedule to FINSERV at least 45 days before commencement of the batch.
- iii. FINSERV shall arrange to make the faculty available as per the schedule informed by the PARTNER INSTITUTE.
- iv. Detailed schedule of the lectures and practical shall be given in advance to students before commencement of CPBFI.

8. Place of teaching:

- i. The class room teaching and practical shall be conducted at C.P. and Berar College, Nagpur by the CPBFI Official Training Partner, for up to four hours a day on such days, dates and at such timings as may be mutually decided between the parties.

9. Eligibility for CPBFI:

- i. Any student who is studying in the final year of Graduation Programme or pursuing any post-graduation programme shall be eligible to apply for admission to CPBFI.
- ii. Additionally, any fresh graduate i.e. a graduate with less than 2 years of work experience or no work experience, shall also be eligible to apply for admission to CPBFI.
- iii. Only candidates who have scored 50% or more marks in their final year graduation examination shall be eligible. In case of final year students, the marks scored by them in the second-year examination shall be considered to decide their eligibility.
- iv. Only candidates who are less than 27 years old, on the date of application, are eligible to apply for admission to CPBFI.
- v. The PARTNER INSTITUTE shall select the final list of candidates for admission based on the criteria mutually agreed upon by the PARTNER INSTITUTE and FINSERV from time to time.

10. Discipline and right to expel:

- i. The students of CPBFI shall be subject to rules of discipline/code of conduct of the PARTNER INSTITUTE during course period.
- ii. If the concerned CPBFI Official Training Partner observes a breach of code of conduct by any student, it shall immediately report the same to the CPBFI Coordinator for necessary action.
- iii. If any participant commits breach of code of conduct of the PARTNER INSTITUTE, the faculty shall have full authority to expel such student for the remaining duration of CPBFI.

11. Faculty:

- i. FINSERV shall be solely responsible for arranging, through a CPBFI Official Training Partner, faculty, with requisite industry and teaching experience, and conducting CPBFI efficiently and effectively. The PARTNER INSTITUTE shall not be responsible for making any payments to the faculty of the CPBFI Official Training Partner.
- ii. Some of the lectures of CPBFI may be conducted by the experts from FINSERV as per the understanding between the parties. However, the PARTNER INSTITUTE shall not be liable to pay any amounts to FINSERV towards the said lectures and no amounts shall be deducted from the amounts payable to the PARTNER INSTITUTE.

12. Certification:

FINSERV and the PARTNER INSTITUTE shall issue a "Certificate of Completion" in "Certificate Programme in Banking, Finance and Insurance" to the eligible students. The certificates shall be printed by FINSERV and shall carry the logos of FINSERV, the PARTNER INSTITUTE and the concerned CPBFI Training Partner.

13. Further Agreements:

The parties agree that, they may mutually discuss and enter into further agreements, if needed.

14. Confidentiality:

- i. The Parties agree to maintain strict secrecy and confidentiality regarding any and all Confidential Information exchanged or to be exchanged between them in relation to this Agreement.
- ii. The PARTNER INSTITUTE agrees that all the course material provided by FINSERV or the CPBFI Official Training Partner, including but not limited to CPBFI structure, curriculum, lesson plans and evaluation methods, shall be deemed to be Confidential Information.
- iii. The PARTNER INSTITUTE agrees that any of FINSERV's technical or business or other information including information given for development of any case studies / development of any program modules / contents, made available by FINSERV or its personnel to the PARTNER INSTITUTE shall be deemed to be Confidential Information.
- iv. The PARTNER INSTITUTE agrees to restrict access and disclosure of Confidential Information to such of their employees, agents, vendors, and contractors strictly on a "need to know" basis, to maintain confidentiality of the Information disclosed to it in accordance with this clause.
- v. Information and material disclosed and provided by each party to the other party in pursuance of or in connection with performance of its obligation under this agreement shall at all times remain the sole and exclusive property of the disclosing Party.

15. Intimation about cancellation/postponement of CPBFI:

- i. If due to any cogent reasons, it appears to the PARTNER INSTITUTE that it is unable to arrange any batch as per schedule, the PARTNER INSTITUTE shall intimate about its inability to FINSERV at least 30 days in advance and the parties shall decide further schedule of CPBFI by mutual consent.
- ii. However, if such postponement or cancellation is necessitated due to any last minute, unforeseen and unavoidable circumstances like Act of God, civil commotion, strike, bandh, disruption of traffic, epidemic, war, aggression, change in Government Policy or any other similar circumstances, the PARTNER INSTITUTE shall intimate the change in schedule as early as possible after such circumstances as stated above have arisen. In such circumstances, the PARTNER INSTITUTE shall not be held liable for payment towards any loss or damages caused to FINSERV due to delay in its schedule.
- iii. If for any reason, FINSERV, decides to discontinue support for CPBFI, it shall give a written notice to the PARTNER INSTITUTE, 30 days in advance. Such notice shall not impact any batch which is already in progress on the date of notice and the terms of this agreement shall continue to apply to the running batches.

16. Amendment/Termination:

- i. Any amendment to the terms of this agreement can only be made by mutual consent of the parties.
- ii. This agreement may be terminated by either party, for breach of terms and conditions of the present agreement or otherwise, by a written notice of at least one (1) month in advance. Such notice of termination shall not interfere with the batches underway at the relevant time. Such batches shall be allowed to continue until their conclusion.

17. Applicable Law and Dispute Settlement:

- i. This agreement shall be governed by the Laws of India.
- ii. Any dispute arising between the parties in connection with or arising out of the performance of mutual obligations under this MOU shall be resolved by mutual discussion and consultation. If the dispute remained unresolved even after 30 days, then the dispute shall be referred to Dr. Milind Barhate, Principal, C.P. and Berar College and Mr. V. Rajagopalan, President (Legal and Taxation), Bajaj Finserv Limited. The decision of Dr. Milind Barhate and Mr. Rajagopalan shall be final and binding on both parties.

18. Originals:

This Agreement is executed in counterparts, each of which shall be deemed to be original and retained by each of the Parties but together they shall constitute one and the same agreement.

IN WITNESS WHEREOF, the Parties hereto have put their hands the day, month and the year first hereinabove mentioned.

For C.P. and Berar College

For Bajaj Finance Limited

For Bajaj Finserv Limited

Name: Dr. Milind Barhate
Designation: Principal

Name: V. Rajagopalan
Designation: President (Legal
and Taxation)

Name: V. Rajagopalan
Designation: President (Legal
and Taxation)

Witness
Full Name:
Designation:

Witness
Full Name: Ajay Sathe
Designation: Chief Customer
Officer

Witness
Full Name: Ajay Sathe
Designation: Chief Customer
Officer

Annexure 1: Format for submission of student information

The PARTNER INSTITUTE shall provide the following information in respect of every student of CPBFI

1. **Full Name:**
2. **Gender:**
3. **Academic qualification:** If already graduate mention the degree. If pursuing graduation, mention the degree for which studying.
4. **Status:** Mention "Complete" if the candidate is already a graduate. Mention "Pursuing" in case of final year students.
5. **Date of Birth:** in DD/MM/YYYY format
6. **Mobile Number:**
7. **Email Address:**

Annexure 2: Methodology for Calculating Overall Attendance of the Batch

The steps and formula for calculating overall attendance are as under.

1. Enrollment: Number of students who have registered and paid fees for CPBFI
2. Drop outs: Number of students who stopped attending CPBFI during the batch

3. Regular students: Enrollment minus Drop Out (Maximum 10% of enrolment will be allowed as Drop outs to calculate number of regular students)
4. Total available student days: Number of regular students multiplied by total duration of CPBFI (number of days. E.g. 40 days)
5. Actual student days: Sum of days attended by each regular student.
6. Overall attendance (%) = Actual Student Days / Available Student Days X 100

Example: In a CPBFI batch 43 students registered and paid fees. By end of first week 3 students stopped attending the batch. The batch was conducted for 40 days. Out of the 40 regular students – 10 attended every class, 15 attended for 35 days, 10 attended for 33 days and 5 attended by 30 days. Overall attendance will be calculated as under.

Enrollment: 43

Drop-out (Max allowed 4.3 i.e. 4): 3

Regular students: 40

Available days: 40 X 40 i.e. 1600

Actual days: (10 X 40) + (15 X 35) + (10 X 33) + (5 X 30) = 400 + 525 + 330 + 150 = 1405

Overall attendance: (1405 / 1600) X 100 = 87.81%

Annexure 3: Information required by FINSERV before commencement of every batch

Sr.	Information Required
1	Basic information about the PARTNER INSTITUTE viz. Name Year of establishment Name of the educational society Contact details Website URL NAAC rating Total number of students (by stream) Total final year students (by stream)
2	Coordinator Details viz. Name Designation Department (Commerce/Science etc.) Contact details: Mobile and Email Address
3	Bank Details for payment of subsidy viz. Beneficiary Name: Bank Account number: Bank Account Type: (Saving/current) Bank Name: Branch: IFSC Code: Please provide scanned copy of a cancelled cheque along with the above information
4	High resolution logo of the college for printing on the Certificate/CPBFI brochures etc. Ai, JPEG, PNG, PDF Format. The image should be high resolution.
5	Brief write up about the institute – for inclusion on CPBFI website, CV book etc.

CPBFI Program Launch Event Schedule

CP Berar College, Nagpur

Duration	Time	Agenda
2-3 min	10:30 - 10:32	Introduction
08 min	10:32 – 10:40	CPBFI Launch Video
10 min	10:40 – 10:50	Bajaj Representative's Speech
10 min	10:50 – 11:00	College Principal's Speech
10 min	11:00 – 11:10	Faculty Introduction
10 min	11:10 – 11:20	Student's Introduction
5 min	11:20 – 11:25	Group Photograph
5 min	11:25 – 11:30	Closing of the Event
5 min	11:30 – 11:35	Distribution of Students' Kits

TRAINERS PROFILE

AJIT PARWATE

E-Mail: ajitparwate@yahoo.com

SENIOR BANKING AND CAPITAL MARKET PROFESSIONAL & CORPORATE TRAINER

Analytical professional with competencies in all phases of **Business Development, Client Servicing, Trade Finance,**

➤ Apr '00 –Jun 00

Financial Analyst

Nagpur

Career Highlights

- Successfully managed complex and big size branches such as Shivaji Nagar and Civil Lines branch.
- Ensured CASA growth of the branches Shivaji Nagar, Akola, Wardha and Manewada & Civil Lines.
- Credited for cracking a major Govt. relationship of Jilha Parishad Nagpur, Tehsildar Nagpur and Akola.
- Acted as a one-point contact for sourcing Govt accounts across Vidarbha for Tehsildar, Grampanchayat, Panchayat Samiti and BDO accounts.
- Won various Zonal & Regional LI and CASA contests
- Managed 2 branches Wardha and Manewada to break even in record time.
- Rendered services as supervisor for post-merger activity of Sangali Bank for Nagpur branches.
- Recognised for achieving **GL growth** of the branch in Financial Year 2008-09 at Civil Lines Branch
- Rendered services as a Spot Auditor for various branches
- Recongnised at National level for reducing the customer wait time to Nil in ICICI Bank Civil Lines.

ACADEMIC DETAILS

- **MBA in Finance** from Deptt of Business Management Nagpur University in 1999
- **B.Sc. PCM** from Nagpur University, Nagpur in 1994

Other Qualifications:

- **PGDFM** from Bharitya Vidhya Bhavans with 1st Rank
- **ICWAI III** passed
- **BA Addln Economics**

PERSONAL DETAILS

Date of Birth: 3rd June 1973
Languages Known: English, Hindi, & Marathi
Residential Address: Plot No 60, Prayag Apartments, Tirthrup, Pande Layout, Khamla Nagpur 440025.

Biographical Information

Name Alekh D.Chourasia
DOB 30th November 1988
Nationality Indian
Address Flat-101,Sudarshan Enclave, Raj Nagar ,Nagpur-440013.
Language English , Hindi , Marathi.
Contact 9730032072 / 8698068484
Email id cfp.alekhchourasia@gmail.com



Professional Qualification:-

Qualifications

✚ MBA (Finance)
✚ CFP (Certified Financial planner)
(2012) ✚ Certified Depository Trainer
✚ Certified Mutual Fund Trainer
(2010) ✚ Certified Commodity Trainer
(2010)
✚ B.COM

Institution/ year Awarded

Orange School of Business (2012)
Financial Planning Standard Board (USA)
NCFM (2010)
National Institute of Securities Market
National Institute of Securities Market

Hislop College - RTM Nagpur university (2009)

Key Insights:-

- MBA in finance and hold multiple Financial certification from FPSB(USA) and NSE INDIA(NCFM).
- Gathered an extensive experience as a trainer in soft skills , business communication ,personality development ,leadership skills and as a Financial proficient during my wide career.
- Excellent Communication and Interpersonal skills to connect and deliver to the masses.
- Around 5 years of experience in the field of training and public speaking.
- Trained Corporate employees, professionals ,teachers and students at all levels .
- Delivered over 200 training assignments and workshops on the mentioned topics.

Imparting Trainings on:-

- Personality Development, Communication Skills, Business Communication, Employability skills, Personal money management, Leadership skills, Time management, Interview skills, Public speaking skills, Behaviour Management , Parent - Student Psychology, Anger - Stress Management, Soft skills and Business Etiquettes.
- NISM modules like Mutual Funds, Equity, Commodity ,depository,beginners etc and Stock market training.

Few Experience Highlights:-

- ✚ Seminar on “Personality Development” , “Building a highly productive team” , “Employability skills” and “Behaviour Management” for Teachers in Sunny Springdale school , Bhandara.
- ✚ Guided Teachers on ‘ Soft Skill Training & Time management’ . Zila Parishad School .
- ✚ Taken parents and students counselling on Parental Relation and various career options available, “Bhavans school” Hinganghat.
- ✚ Full Day Training session conducted for Teachers at School of Scholar , Bhandara.
- ✚ Trained over 200 educational institutes on Soft skill, P.D, Leadership , Goal setting, Motivational seminars etc.

Played many roles such as:-

- ✚ **Started my Career as a Product manager (cross sell) for Bajaj Finserv Ltd (Corporate Office-Pune)**
- ✚ Director and co-founder of a prestigious educational Institute in Nagpur.
- ✚ Visiting Skill development Trainer for students at various educational Institutes & colleges. ✚ Trained Professionals and Teachers on various vital topics.
- ✚ Professional Career Counsellor for over 5 years for students of different age groups. ✚ Counselling several parents on students psychology and various career options.
- ✚ Mountaineer, Audacious, Nature admirer - mounted to India’s one of the toughest terrain(Shrikhand Mahadev , Himalayan valley -Altitude : 18750 feet) conquered the summit in 3 days.

Client:-

- Over 250 Schools - Bhavans, SOS, Sunny Springdale,Center Point, Jain Internationals,Podar Group, Xaviers, Montford, MVM, etc.

- Teachers Training- SOS , Springdale , jaycees , Bhavans etc.
 - Government schools and colleges -ZP, Polytech colleges , KITS engineering college ,etc)
 - Western Coalfield Ltd (WCL)
 - MOIL
 - Punjab National Bank (PNB)
-

Profile of Mr.Siddhant Agrawal

CFP, CWM



- 19 years of rich experience in the field of Finance.
- Co-founder of MYPROFIN Learning Solutions Ltd and an NISM CPE Trainer for Mutual Funds and Equity Derivatives.
- MBA in Finance, M.Com, Certified Financial Planner, Chartered Wealth Manager and currently pursuing Certified Financial Analyst (US).
- Financial Coach, Passionate learner, Innovative and believes in disciplined execution of ideas and strategies.
- Worked for various companies like Ventura Securities Ltd, IL&FS Investsmart India Ltd, Reliance Edge Academy and last job was with ICICI Direct Centre for Financial Learning as a Senior Knowledge Manager, Pune / Mumbai.
- Till date conducted more than 1200 Workshops/ Seminars for organizations such as NISM, CIEL, NSE, BSE, ICICI Securities, NJ India, ICOFP, Ambition, AAFM, LIC etc.
- Conducted and delivered more than 500 Investor Awareness Programs.
- Trainer for Bajaj Finserve Ltd pertaining CSR Trainings.
- Management Development Faculty for Public Sector Undertakings.
- Good orator and regular contributor of articles in financial magazines/newspapers.
- Conducted various programs on topics like Financial Planning, Financial Mathematics, Foundation in Equity, Beginners F&O, Derivatives Strategies,

Debt and Alternative Investment, Commodities, Mutual Funds, etc.

- Impart training for CFP, CWM, Equity & Mutual Funds and Soft Skills for Corporate.
- Guest Faculty for Mgmt Colleges and has delivered Guest Lectures in institutes like PUMBA, Lexicon, Sinhgad Inst of Mgmt, Ambedkar College etc.

	<p>SUCHETA ANKUR DHOOT SOFT SKILLS & LIFE INSURANCE TRAINER</p>
<p>CONTACT</p>	<p>OBJECTIVE:</p> <p>Seeking challenging opportunity to prove my abilities and strive to excel in all endeavours I embark on. Develop the Soft Skills of individuals to help them gain confidence – an invaluable trait in the business world.</p>
	<p>PROFESSIONAL SKILLS</p>

ADDRESS:

13, Satyavibha, Tilak
Nagar, Nagpur,
Maharashtra
India Pin – 440 010

MOBILE/ LANDLINE:

Home: (091)
(712)2546601
Mobile: 09011049994

E-MAIL:

sucheta.a.dhoot@gmail.com

- Result oriented.
- Excellent people relationship.
- Good presentation skills and interactive approach, training ability.
- Very good in maintaining a network and ability to persuade individual.
- Profound management and organizational skills with great interpersonal skills.
- Proficient ability to work in a team or individual and possesses leadership qualities.

EXPERIENCE

- **Pro. National Trainer for Junior Chamber International, India** from May 2019.
- From July 2012 Providing Services as a **Freelance Soft Skills and Life Insurance trainer for Schools, Colleges, Corporate/Business Professionals and Individuals**
- **Management consultant at yashOm Dental Clinic and Implant centre, Nagpur**
- **Certified Zone Trainer for Junior Chamber International Zone IX** (Part of Maharashtra, MP & Chattisgarh)
- **IELTS Trainer with Impel Overseas** from May 2018 to August 2018
- **Assistant Training Manager** (Direct Agency) with **Max Life Insurance Co.** from September 2013 to January 2015. Profile mainly involved pre-licensing training to prospective insurance agents, Product trainings to managers & agents, Training Needs Analysis, preparation & maintenance of training calendar; **sales skills & Soft Skills training to agents & managers.** Worked as a knowledge sharing point for branch of more than 400 agents & 25 managers. Responsible for branch day to day progress strategies build up as a part of office leadership team.
- Associated with **RNIS Insurance College** and **Siddharth College Of Insurance** for pre-licensing exam training to prospective life insurance agents from July 2012 to September 2013.
- From February 2008 to July 2012, worked with **SBI Life Insurance Co. Ltd.** as an “**Operations Executive**”,

PERSONAL INFORMATION:

Date of Birth:
4th September 1982

CITIZENSHIP:
Indian

GENDER:
Female

MARITAL STATUS:
Married (6th June' 2010
to Dr. Ankur Dhoot,
Dental Surgeon)

LANGUAGES KNOWN:
English, Hindi,
Marathi, Marwadi

FOLLOW ME:



The profile mainly involved:

- **Group & Individual Life insurance underwriting** for agency/ bancassurance channel
 - Periodic reconciliation, vendor management, post policy issuance services, tracker & MIS maintenance, report presentation.
 - **Training sessions to Operations & Sales staff** on Operational and Underwriting aspects
 - To be a support system & knowledge sharing resource for the staff of around 500 State Banks of Indiabranches, SBIL sales team and customers
 - **Implementation of ISO 9001:2000 certification** for the Nagpur SBI Life branch in which **my distinguished contribution** is
 - To streamline the branch data for **faster retrieval**.
 - Study the various processes and incidences at Processing Center and Mini Processing Centers, **build case studies** on that to identify the areas for improvement and set new mile stones. The Case Studies written were appreciated by the auditors and proved to be important for process improvement & standardization.
- Worked with "**HDFC Standard life Insurance Co Ltd**"(Nagpur Branch), as a '**Sales Development Manager**', from January' 2007 to November' 2007. The job included
- The responsibility to recruit the 'Financial Consultants', train and retain the team.
- From March'2006 to December'2006, worked as a "**Financial Services Consultant**" with **ICICI PRUDENTIAL LIFE INSURANCE COMPANY LTD.**, in **Bancassurance** channel of "ICICI Bank" and "Bank of India".

CAREER ACHIEVEMENT

- Certified "**National Trainer**" for **Junior Chamber International, India** in **May 2019**.
- Certified "**Zone Trainer**" for **Junior Chamber International, Zone IX** in **August 2018**.
- Winner of region level contest for training manager, "**JumpStart**" at Maxlife in FY 2014-15
- **Max Life Dronacharya** award for 100% batch passing in IC-33exam for consecutive 3 months in 2014.
- **Appreciation certificate** at SBI Life for performance in "**Renewal Collections**" in FY 2010-2011
- Cleared all the **internal evaluation tests** at SBI Life insurance with average percentage of **92%**for FY 2010-2011 & FY 2011-2012
- I was invited to the **ICFAI Business School Nagpur** as an **external evaluator** to judge the best Summer Internship Project Award for the year 2009-10.
- **Appreciation certificate** at **SBI Life Insurance Co. Ltd.** for the financial year 2008-09.

- Qualifier for the contest “**Rajyabhishek**” (2007) at **HDFC SLIC** (Highest Recruitments of agents)
- Achiever of "**Flash Target**" (2006) in **ICICI Prudential Life Insurance Co. Ltd.** for which the required business of first 45 days of joining was Rs.5lacs(Premium amount).

EDUCATION

Std./ degree	Year of passing	University/board	Name of institution	Percentage
M.B.A.	2006	ICFAI	IBS Pune	CGPA-7.30
B.PHARM	2004	Nagpur University	Nagpur College of Pharmacy	63.14%
HSSC	1999	Maharashtra Board	Hadas Junior College	51.67%
SSC	1997	Maharashtra Board	Hadas High School	62%

INTERESTS & EXTRA CURRICULAR ACTIVITIES

- **President 2019 JCI NAGPUR VIBRANT**
- **Secretary 2019-20 Lions Club Nagpur Zenith.**
- Conducted “**College to Corporate**” trainings for more than 100 college students under Lion’s Club Service week.
- Art & Craft work, best out of waste creativity.
- Participated and won online “TATA Corporate quiz” in 2010
- Represented SBI Life Ins. Co. for “TATA Crucible Corporate Quiz” in FY 2010-11
- Member of CULTURAL COMMITTEE (during graduation & M.B.A.)
- College representation for Nagpur University Inter-collegiate PERSONALITY COMPETITION 2003-04
- College representation for Nagpur University Inter-collegiate ESSAY WRITING COMPETITION 2001-02
- Active participation in Inter-college WALL MAGAZINE ACTIVITY during graduation.
- 5yrs. active membership of Bharat Scout and Guide

**PLACE:
NAGPUR**

SUCHETA ANKUR

NOTICE – Students were made aware about this training program beneficial for banking and insurance job opportunities after passing out. For this notices were floated and sent to registered mobile numbers of students.

NOTICE 1

CPBFI Notice

Dear Students,

Now that college is getting over, your future depends on what kind of job you do. While the degree has trained you up for the basics of all jobs, you need to be more focused on what you want to do. The companies today, look for 3 major things: Dedication, Knowledge and Clear Communication While we know you are dedicated, to improve your knowledge and communication, we have tied up with Bajaj Finserv, for a Certificate Program in Banking, Finance and Insurance – CPBFI.

This program will train you to become a professional for the Banking, Finance and Insurance industry. The program has a mix of communication skill training, industry knowledge and working and interview experience workshop.

It will be held online, and industry professionals – from banks and insurance companies will teach you the subjects. You will also get an end-to-end interview experience of an actual interview, with feedback and points to work on. This program will increase your confidence, communication level and knowledge, giving you an edge to get a job.

We are holding an introductory seminar on CPBFI which shares more insights on CPBFI on the program. meeting how will it help you today and for your and what will be your career opportunities after the program. Introductory seminar on: 27 July 2019

We know that there is huge potential in you, this program is the opportunity we can get for you to start your journey towards achieving heights.

Regards,

Mrs. Medha Kanetkar

9970934336

<https://youtu.be/j0URvbyFQOQ>



DETAILS OF THE WORKSHOP

C. P. And Berar College launched Certificate Program on Banking, Finance and Insurance online course under CSR of Bajaj Finserv Company, which was inaugurated on 27 July 2019. The course was of 45 days duration and had provided training on Banking, Insurance, Finance and Emotional Intelligence.

The inauguration program was attended by the Principal of the college, Dr. Milind Barhate, Lead Trainers Amrita Naval and Alekh Chaurasia, as well as Coordinator Dr. Medha Kanetkar.

CPBFI trainers explained about

- Banking Sector in India & Across
- Insurance & Finance Sector,
- The first-generation graduates and eligibility
- Skills and Qualifications
- Challenges for graduates aspiring for a successful career

CPBFI was conducted by a pool of trainers with extensive industry and training experience. The courses are delivered using an experiential-learning approach based on adult-learning principles. This unique combination of content and pedagogy makes CPBFI one of the best extra-curricular programs that a college can offer its students.

Photos of the workshop



PARTICIPANTS

Learner Name	Login ID	Password	Location	Email ID	Mobile
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Feedback on Faculty

FaCulty Name	Subject	% of students#
Mr. Aijt Parvate	Banking	64.41
Ms. Sucheta Dhoot	Insurance	57.63
Mr. Alekh Chaurasia	Communication	69.49

/o of students that have rated the respective faculty as "ExCQllent".

Feedback on Endorsement by students

Voice of students	/o strongly agree
My confidence has improved (Attitude Development)	50.85
My communication has improved (Skill Development)	50.85
My industry knowledge has improved (Knowledge Development)	52.54
CPBFI was the right decision for my career (Overall satisfaction)	54.24

Interview Performance

	Attended	Shortlisted	Success Rate
Pre-CPBFI Interview (PCI)	71	18	25.35%
HR Workshop (HRW)	40	13	32.50 %»

	NO. of students	/o of total
Attended both rounds	40	
Not successful in PCI but successful in HRW	3	7.50%
Functional skill rating improved	9	22.50%
Personality and Confidence rating improved	8	20.00%
Communication skills rating improved	13	32.50%

OBJECTIVE ACHIEVED - It could be observed that objective of CPBFI is to impart practical knowledge and essential skills to final year graduation students and fresh graduates, especially those belonging to economically weaker sections of the society, with a view to create employment opportunities for them in the Banking, Finance and Insurance Companies.

CERTIFICATE

