

Vihaan Menon

Relationship Manager

VM

Kochi, India vihaan.menon@example.com Fictional sample

01 Professional profile

Relationship Manager with an illustrative 11-year career focused on client needs discovery and coordinated financial-service relationships. Core strengths include Client discovery, Relationship planning and Service coordination. Selected examples describe the challenge, contribution and handover materials.

02 Professional experience

Jul 2022 - Present

Relationship Manager

Asterline Financial Services · Kochi

Delivered defined workstreams in client needs discovery and coordinated financial-service relationships, coordinating reviewers and delivery partners.

- Prepared structured discovery notes and referred specialist questions to authorised colleagues.
- Created an owner-led service follow-up record and communicated status without promising unapproved outcomes.

Jul 2018 - Jun 2022

Relationship Manager

Northmere Financial Services · Kochi

Developed hands-on experience across client needs discovery and coordinated financial-service relationships, with a defined review process.

- Used client discovery and portfolio reviews on assigned work; recorded decisions so colleagues could understand the approach.
- Prepared handover materials and incorporated specialist feedback before closing the workstream.

Jul 2015 - Jun 2018

Operations Associate

Cedarfield Financial Services · Kochi

Built foundations through supported assignments, observation and practical feedback.

- Assisted with relationship planning and documentation, checking work with an experienced reviewer.
- Kept organised work records and developed clear handover habits through supervised practice.

EXPERTISE

Core capabilities

Client discovery

Relationship planning

Service coordination

Portfolio reviews

Documentation

Stakeholder communication

SELECTED WORK

Client review journey

Relationship plan and meeting record

Service escalation loop

Service resolution tracker

LANGUAGES

English - professional working

Hindi - professional working

CAREER CONTEXT

11 years in this illustrative career.

Three appointments.

Full work examples on page 2.

03 Banking work examples

Long-term relationships, built on clarity.

WORK EXAMPLE 01 / ILLUSTRATIVE	Context Reviews focused on product conversations before establishing client needs. Contribution Prepared structured discovery notes and referred specialist questions to authorised colleagues.
Client review journey	
Prepared for handover Relationship plan and meeting record	

WORK EXAMPLE 02 / ILLUSTRATIVE	Context Clients repeated their issue across multiple teams. Contribution Created an owner-led service follow-up record and communicated status without promising unapproved outcomes.
Service escalation loop	
Prepared for handover Service resolution tracker	

04 Education

2013 – 2015
MBA in Financial Services
Asterbridge Institute of Professional Studies Specialist study with a practice focus on client discovery and relationship planning.
2009 – 2013
Bachelor of Commerce
Cedarhaven College of Applied Studies Foundation study, practical assignments and supervised learning. Fictional institution and qualification record.

05 Professional development

2024
Client discovery - advanced practice workshop
Scenario exercises and peer review in client needs discovery and coordinated financial-service relationships.
2025
Portfolio reviews - reflective practice seminar
Applied learning reviewed through a bounded example and a written reflection.
Continuing learning examples, not licences or independently verified certifications.

06 Practice & evidence notes

Work focus	Evidence status	Contribution scope
Client needs discovery and coordinated financial-service relationships	Illustrative work descriptions; no source artefacts attached	Owned the stated workstream, not all team outcomes

Every employer and institution in this CV is fictional. The two work examples describe individual contributions; supporting artefacts and externally measured outcomes are not supplied. Replace example information with accurate records and permission-cleared work before using this CV.