

# Varad Kulkarni, MSc Maths

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## SUMMARY

Dedicated and focused Finance Trainer in the BFSI sector with over 600 hours of successful public speaking sessions in the past year, targeting diverse audiences. Certified Financial Planner with a research background, managing existing clients for a firm and delivering personalized financial services. Seeking a Wealth Manager/Relationship Manager role to apply BFSI training expertise and research acumen in effectively managing personal finances for individuals and families.

## CORE SKILLS

- |                        |                   |                       |                       |
|------------------------|-------------------|-----------------------|-----------------------|
| ✓ Communication Skills | ✓ Problem Solving | ✓ Financial Markets   | ✓ Investment Planning |
| ✓ Presentation Skills  | ✓ Adaptability    | ✓ Financial Analysis  | ✓ Tax Planning        |
| ✓ Team Collaboration   | ✓ MS Office       | ✓ Quantitative Skills | ✓ Portfolio Review    |

## PROFESSIONAL EXPERIENCE

### ○ Ambition Learning Solutions, Mumbai

**Nov 2022 - Present**

#### Training and Content - Executive

- Delivered 80+ Investor Awareness Programs online and offline in association with BSE, ICICI Pru AMC, Aditya Birla AMC, Tata Mutual Fund, NSDL and Motilal Oswal
- Coached employees of various corporates such as Bluestar India, Hyundai Motors, Airtel, DCM Shriram, Sakal Media Group, Eveready Industries, Zydus Lifesciences, Shapoorji Pallonji Real Estate, etc. by recommending proper Investment Strategies
- Trained more than 450 students and working professionals in the BFSI sector for NISM Certifications such as NISM VA – Mutual Fund Distributor, NISM XII – Securities Market Foundation
- Crafted course content for Financial Planning Programs and increased awareness about Mutual Funds for 3200+ investors
- Co-ordinated with the Sales and Operations team to deliver a seamless and consistent training experience for the participants

### ○ Shri Sai Prasad Services, Amravati

**Aug 2021 - Nov 2022**

#### Research Assistant

- Developed a process for equity funds selection and debt funds selection
- Conducted portfolio reviews of existing clients and implemented the critical changes required after market trend analysis thus managing risk effectively
- Evaluated and identified potential investment opportunities, funds and contributed to informed decision making and scheme selection for the organization

## EDUCATION

### **Master of Science (M.Sc.) - Mathematics**

**Aug 2014 - Aug 2021**

BITS Pilani KK Birla Goa Campus, Sancoale, Goa - 403726

## CERTIFICATIONS

- |                                     |                                                |
|-------------------------------------|------------------------------------------------|
| ➤ CFP - Certified Financial Planner | ➤ How to select the right Equity and Debt fund |
| ➤ NISM VA - Mutual Fund Distributor | ➤ NISM XII - Securities Market Foundation      |
| ➤ NISM XXI - PMS Distributor        | ➤ NISM VIII - Equity Derivatives               |