Shruti Jadhav

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Profile

As a Certified Financial Planner with 2 years of work experience in wealth management industry, want to a secure position where I can utilize my expertise in financial planning, investment management and risk management to provide exceptional service to clients and help them achieve their financial goals Possess strong analytical skills, financial product knowledge and a track record of managing high-net-worth client portfolios to achieve financial goals and optimize returns.

Professional Experience

2023/11 – present
Pune, India

Senior Paraplanner
Valenta

Financial Planning Analysis:
Conduct in-depth analysis of clients' financial situations, including income, expenses, assets, and liabilities.Collaborate with financial advisors to develop comprehensive financial plans tailored to clients' goals and risk tolerance.

Investment Research and Strategy:
Research and evaluate investment options based on clients' financial objectives and market conditions.Assist in designing investment strategies that align with clients' risk profiles and long-term financial plans.

Regulatory Compliance:
Stay abreast of regulatory changes in the financial industry and ensure adherence to compliance standards.Provide guidance on compliance issues related to financial planning activities.

Client Communication:
Act as a point of contact for clients, addressing inquiries and providing updates on financial plans.Collaborate with financial advisors in client meetings to explain complex financial concepts and strategies.

Documentation and Reporting:
Prepare and maintain accurate and comprehensive documentation of client financial plans.Generate regular reports on clients' portfolios, performance, and progress towards financial goals.

2021 – 2023
Pune, India

Financial Planner
Ready Wealth

- **Customized Financial Planning:**
  Developed and delivered meticulously tailored financial plans, encompassing budgetary frameworks, retirement strategies, tax optimization tactics, estate planning and astute investment strategies.
- **Portfolio Management:**
  Strategically managed and advised high-net-worth clients on their investment portfolios, consistently aligning returns with client goals and risk tolerance levels.
- **Performance Tracking:**
  Monitored portfolio performance and delivered regular performance updates to clients, ensuring transparency and accountability.
- **Cross-Functional Collaboration**:
  Collaborated effectively with investment analysts and market experts to identify emerging trends, assess risks, and capitalize on opportunities in the financial markets.

Key Achievement

- Developed and presented investment strategies that aligned with clients' long-term financial goals and risk profiles.
- Successfully passed the CFP certification exam demonstrating expertise in financial planning and wealth management.

Education

2021 – 2023
Mumbai, India

PGDBM (Finance)
NMIMS

CFP (Certified Financial Planner)
Financial Planning Standard Board FPSB.
Cleared the following modules

- Investment Planning Specialist.
- Retirement & Tax Planning Specialist.
- Risk & Estate Planning Specialist.
- Integrated Financial Planning.

2016 – 2020
Pune, India

Bachelor Of Commerce (Cost & Works Accounting)
Savitribai Phule Pune University
Passed with 72% first class with distinction.

2014 – 2016
Pune, India

HSC 12th
St.Mira's Girls College
Passed with 74.31%

2013 – 2014
Pune, India

SSC 10th
Priyadarshini English School
Passed with 81.40%

Skills

- Financial Planning & Wealth Management
- In-depth knowledge of financial markets, including equities, fixed income & insurance
- Taxation Strategy & Optimization
- Conversant with MS Excel, MS Word, MS Powerpoint.
- Market Research & Analysis
- Investment strategy development
- Effective communication & Interpersonal abilities

Professional Development

Mentored over 40 interns to foster proper completion of assigned duties

- Developed and executed an intern mentoring program guiding a diverse group of 40 interns throughout their tenure.
- Conducted weekly one-on-one meetings with each intern to provide feedback, address questions, and ensure they understood their responsibilities.
- As a result, intern productivity increased by an average of 30%, leading to smoother project execution and enhanced team collaboration.

Shared my financial planning knowledge within the team through sessions

- Initiated and led bi-monthly knowledge-sharing sessions within the team, covering topics such as financial planning strategies, market trends and investment opportunities.

Certificates

- Investment Planning Specialist
- Retirement & Tax Planning Specialist
- Risk & Estate Planning Specialist