



# SHREYA SADLAPUR

## About Me

Dedicated financial professional with a proven track record in mutual fund management. Committed to delivering strong returns for clients through strategic investment strategies. Analytical and communication skills to navigate complex financial landscapes.

- 9307144978
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- Pune

## LANGUAGE

- English
- Hindi
- Kannada

## CERTIFICATIONS

- NISM Series V-A: Mutual Fund Distributors Certification Examination

## EXPERIENCE

### ICICI Prudential Asset Management Company Ltd (Pune)

Feb 2023 – Currently Working

Handling virtual channel of ICICI Prudential AMC in tie up with HDFC Bank

Implement targeted marketing strategies to attract new clients and showcase the benefits of mutual fund investments

Proficiently communicate fund information, actively engage in client presentations, and provide comprehensive education on mutual new fund offerings (NFO)

Maximize client value by recommending complementary mutual funds (cross-selling) and encouraging existing investors to upgrade their investment portfolios (upselling)

### Data Bridge Market Research (Pune)

Jun 2019 – Sep 2019

As Business Development Executive Intern my job was to generate leads through e-mail marketing

Worked closely with the marketing team & outbound department

## EDUCATION

### NMIMS Global Access School for Continuing Education

2021 - Expected 2024

Post Graduate Diploma in Business & Management (PGDBM)

### Savitribai Phule Pune University

2016 - 2020

Bachelor of Commerce (BCOM)

## SKILLS SUMMARY

Financial Planning	78 %
Investment Advisory	81 %
Risk Management	68%