

Rushikesh Shivgan

Advisory Manager

To obtain a challenging position with a dynamic firm that will allow me to utilize my existing skills and also provide a platform for my career growth. Having around 4 years of experience in financial planning, investment advisory and research, and overall support managing their finance. I would like to enhance my professional capabilities, knowledge and skill through experience. To prove myself as an asset in an organization where the opportunity is endless so I can learn new things from the ground up thereby contributing towards its success.

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 9096634445

 Hyderabad, India

WORK EXPERIENCE

Advisory Manager

Guardian Capital Investment Advisory.Ltd

04/01/2023 - Present Hyderabad, India

Achievements/Tasks

- Collaborated with clients to formulate and present tailored financial plans using excel and power point.
- Conducted through research on mutual funds, provide valuable insights to inform investment decisions.
- Contributed in developing financial models, graphs and visual representations to effectively communicate research findings.
- Underwent comprehensive training under Business Head, gaining valuable insights into client centered financial planning strategies

Investment Counselor

www.MoneyWorks4me

15/07/2019 - 31/12/2022, Pune, India

Achievements/Tasks

- Provided high quality investment guidance to clients based on their needs, goals, and lifestyle.
- Responsible for developing and maintaining a long term relationship with the clients to maintain high level of retention of the existing customers.
- Implemented annual, quarterly campaigns to current and potential clients.
- Contributed to a productive and happy work environment, dedicated to the satisfaction of the client.

EDUCATION

B-Tech (Chemical Technology)

Department Of Technology

07/2014 - 07/2017, 7.58

Diploma

Government Polytechnic Osmanabad

06/2011 - 05/2014, 81.03

SSC

Vidyabhavan High School

85.45

SKILLS

Financial Planning

Microsoft Excel

Relationship Management

Technical Analysis

Financial Modeling

Wealth Management

COURSES

Certified Financial Planner - Financial Planning Standards Board - India (FPSB).

Microsoft Excel for Finance - The wall street school India

Financial Modeling

Took the CFA Level 1 Examination in August 2023, awaiting results

LANGUAGES

Marathi

Native or Bilingual Proficiency

English

Full Professional Proficiency

Hindi

Full Professional Proficiency

INTERESTS

Reading (mostly related to finance)

Travelling