

Tejas Sunil Amrutkar



Wealth Manager



3 Years 6 Months



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Profile Summary

Mutual Fund Advisory professional with 3.6+ years of experience in client acquisition, SIP onboarding, portfolio explanation and AUM growth. Skilled in Mutual Fund product knowledge — Equity, Debt, Hybrid & ELSS. Proven ability to achieve sales targets, promote NFOs, manage distributor relationships and deliver strong client servicing. Focused on building long-term portfolios and helping clients plan investments with disciplined asset allocation.



Education

MBA/PGDM, 2025

Dr. D. Y. Patil Vidyapeeth, Pune

B.Com, 2021

Pune University



Work Experience

May 2022 - Present

Wealth Manager

Devs Investment and Solutions

- Client acquisition and SIP onboarding for Equity, Debt and Hybrid Mutual Fund schemes.
- Explaining Mutual Fund products, risk profile, asset allocation and long-term investment planning.
- Generating AUM through SIPs, Lump-sum investments and portfolio rebalancing.
- Presenting NFOs, new schemes and market updates to clients.
- Maintaining strong client relationships through regular portfolio review and servicing.
- Achieving monthly sales targets and contributing to overall business growth.
- Educating clients about financial goals, tax-saving (ELSS) and disciplined investing.
- Solving client queries related to investments, returns, market movement, NAV and transactions.
- Coordinating with distributors, partners and internal teams for smoother operations.
- Ensuring compliance and completing documentation for KYC, FATCA, SIP, STP and redemption requests.



Key skills

- Mutual Funds
- General Insurance
- Portfolio Manager
- MS Office
- Mutual Funds Sales
- SIP
- Portfolio Analysis
- Equity
- Goal Management
- Relationship Management
- Market Research
- Cross Selling
- Communication Skills



Personal Information

City	Nashik
Country	INDIA



Hobbies

- music
- travelling



Languages

- English
- Hindi
- Marathi



Extra curricular

Certifications

NISM Series VA
IRDA IC38

