



# Yadhu Nand S

## Operation Executive

### My Contact

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📍 Dubai, UAE

### Hard Skill

- Investment Management
- Portfolio Optimization
- Risk Assessment
- Asset Allocation
- Technical Analysis
- MS Office

### Soft Skill

- Observation
- Decision making
- Communication
- Multi-tasking

### Education Background

- University of Calicut  
*Bachelor of Business Administration & LAW (Hons)*  
Completed in 2020
- Veda vyasa Vidhyalaya  
*High School*  
Completed in 2015

### Achievements

- Successfully educated over 100+ individuals and households on various aspects of personal finance, including budgeting, saving, investing, and retirement planning, leading to improved financial literacy levels within the community.
- Maintained consistently high client satisfaction ratings, with over 90% of clients reporting increased confidence in managing their finances and achieving their financial goals after utilizing our services.

### About Me

Dedicated and results-driven Wealth Management Advisor with 4 years of experience in the Indian financial markets. Proven track record of providing comprehensive financial planning and investment advisory services to high-net-worth individuals and corporate clients. Skilled in portfolio management, risk assessment, asset allocation, and wealth preservation strategies. Strong expertise in navigating the complexities of the Indian financial landscape to maximize returns and achieve clients' financial goals.

### Professional Experience

Finomis Investmart LLP | *Client Dealer*  
2023 – 2024

Key responsibilities:

- Provided personalized financial advisory services to a diverse clientele, including high-net-worth individuals, families, and corporate entities.
- Conducted comprehensive financial analyses to assess clients' current financial status, identify goals, and develop customized wealth management strategies.
- Monitored and managed clients' investment portfolios to optimize performance and mitigate risks in line with market dynamics and regulatory changes.
- Cultivated and maintained strong client relationships through regular communication, financial reviews, and proactive advisory services.
- Stayed abreast of market trends, economic indicators, and regulatory developments to provide informed investment recommendations and wealth management insights.

Edge Fin | *Co-Founder*  
2020 – 2022

Edge Fin is a platform aimed at making people financially literate and helping them channelize their savings into the right financial investments which can help them attain financial freedom. We aim to simplify your personal finance planning and find the right financial instruments for your household savings, which align with your financial goals by making financial education easily accessible at your convenience.

Key responsibilities:

- Designing educational materials and courses on finance, investing strategies, and risk management.
- Creating engaging content such as articles, videos, and webinars to simplify complex financial concepts.
- Conducting workshops and training sessions to teach practical investing skills and market analysis.
- Providing personalized coaching and advice to individuals on investment decisions and portfolio management.
- Analyzing financial markets to identify opportunities and trends, sharing insights with clients.
- Educating clients on managing risks and protecting their investments.