

CURRICULUM VITAE

Name : Awantika
Email : awantika24@gmail.com
Mobile no : +91 9953036243
Address : J-1/19, Khirki Extension Malviya Nagar
Near Krishna Mandir, New Delhi-110017

Objective:

To work with an organization this provides new challenges and opportunities to enhance organization as well as personal growth.

Key Skills

- Competent knowledge in field of financial management and investments.
- Familiarity with the laws and regulations related to asset management.
- Good analytical skills that help comprehend complex financial data.
- Ability to build and retain strong advisor-client relationship.

Organizational Experience:

- Currently working As Relationship Manager (Wealth Advisor) with Almondz wealth advisors Ltd. Scindia House, Connaught Place ,New Delhi, India.(Since Nov 2011 to Till Date).

Profile Summary:

- A Competent Professional with nearly 4 Years experience in:
 - ~ Mutual Fund (equity, debt, bonds, NFO)
 - ~Insurance product
 - ~Team Management
 - ~MIS Reporting & Documentations
- Provided investment management, planning, investment banking, and insurance services for clients, interpreting financial information to develop strategies that successfully met their wealth objectives.
- Expertise in maintaining Relationship with Key Corporate Clients, HNI clients, retail clients and Establishing High Profit Account with excellent level of retention.
- Well organised with track record that demonstrates self-motivation, entrepreneurial ability, creativity and initiative to achieve corporate goals.

Core Competencies:

- Generating leads and conducted client meetings to update, review and develop financial goals.
- Recommend the several investment options available to ensure steady returns.
- Extend financial planning and wealth management services to clients and Ensure the clients receive high returns and an increased profitability rate
- Advise the clients on making accurate tax payments and lessening tax burden legally.
- Interact with pre-existing clients, ready to provide relevant information about the market and trends, resolve their queries and explain complex terminologies to them.
- Preparing MIS report of clients and provide feedback to top management on business operations.
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- Provide efficient support to our sales team in their day to day operation and perform relation duties/work on timely basis for efficient operation.

Academic Credential:

- B.Sc. C.S.J.M. University, Kanpur 60.4% in the year 2011.
- Class XIIth U.P Board, Allahabad 69.8% in the year 2008.
- Class Xth U.P Board, Allahabad 72.5% in the year 2006

Exposure to Computer:

- Proficient In MS-OFFICE (Word, Power Point, Excel)
- Internet

Skills & Strengths:

Skills:

- A dynamic individual determined to work in the corporate sector.
- Drive to exceed expectations coupled with good comprehension of finance markets.
- Effective communicator
- Creative
- Quick decision making ability

Strengths:

- Positive attitude
- Flexibility in work
- Confident

Personal Details:

Date of Birth : 30/07/1992
Sex : Female
Marital status : Single
Nationality : Indian
Language known : Hindi, English
Permanent Address: Plot No. 86, Gova Garden,
New Ashok Nagar Kalyanpur, Kanpur U.P.

Declaration:

I hereby declare that all the information provided is true to the best of my knowledge.

Date:

Place:

Awantika