

SHITAL D. ZELE

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Mobile no.: 9619320313

OBJECTIVES

To be associated with a professionally managed company and work with my highest potential to achieve the goals of the company and I would like to cherish demanding position that make effective use and upgrades my existing knowledge and skills.

Internship

Total Experience: 2 months (Internship)

Company Name: Padam Finniv Ltd.

Company Profile: Intern

EDUCATIONAL QUALIFICATION

Qualification	Board/University	Institution	Year of Completion	Marks (%)
Masters in Management studies (MMS)	Mumbai University	Rajiv Gandhi Institute of Technology	2014	Passed with A grade
Master of Commerce(MCOM PART1)	Mumbai University	M. L. Dahanukar College	2012	56.50%
Master of Commerce(MCOM PART 2)	Mumbai University	Mumbai University(IDOL)	2015	Appeared exam in 2015
B.COM. (Financial Markets)	Mumbai University	M. L. Dahanukar College	2011	81.50%
HSC	Mumbai University	Mithibai College	2008	77.33%
SSC	Mumbai University	Poorna Prajna High School	2006	78.53%

TECHNICAL SKILLS

- Basic Computer Knowledge
- Operating Systems: WINDOWS 98/XP/Vista/7/8.
- NIIT course on IT fundamentals
- Analytical skills
- Comfortable with numbers.
- Willingness to coordinate among multiple teams.
- Willingness to meet asset managers to get views on financial markets and financial products.

- Willingness to be constantly updated on new happenings

ADDITIONAL QUALIFICATIONS

- Certified Financial Planner
- Certified IRDA

EXTRA CURRICULAR ACTIVITIES

- BSE course on Basic Derivatives Program.
- BSE course on Fundamental Analysis.
- BSE course on Capital Market.

INTEREST AND HOBBIES

Cooking, Dancing

PROFESSIONAL EXPERIENCE:

PLAN AHEAD WEALTH ADVISORS PVT LTD: (April 2014 – Present)

- Financial Plan Creation, Wealth Management and Investment Advisory
- Asset allocation, Cash flow management, Portfolio review and rebalancing.
- Risk Profiling for clients. Risk and return management of clients basis their Risk Profiles.
- Research on multiple financial products – mutual funds, equities, Insurance, Fixed Deposits, etc.
- Preparing presentation, Execution and Monitoring of financial plan at regular Intervals.
- Assisting Senior Financial Planner/ Wealth Advisor for Client Meetings and implementation of suggested Financial Plan.
- Execution of Direct Equity transactions on BOLT.
- Meeting with Asset Managers to get their view on financial markets and financial products.
- Sharing research/investment updates with investment advisors on an ongoing basis.
- Managing Clients Servicing requests through telephone and email.
- Preparing documentation for various investment products.
- Sharing Newsletter, writing social blog, Social Media related activities on Financial Planning
- Updating of client servicing softwares.

SOFTWARES WORKED ON

- Omnimax - Plan creation
- Excel based software - Plan creation.
- FE Analytics – Data collection on Mutual funds.
- Investwell – Client details.
- Zoho Support – Managing daily tasks.

PROFILE PERSONA

Name	: Shital Zele
Father's Name	: Dilip Zele
Date of birth	: 11 May 1991
Sex	: Female
Nationality	: Indian
Marital Status	: Single
Address	: 201, 202 Shree Apt, Juhu church road.

Near Iskcon temple,
Juhu,
Mumbai-400049

LANGUAGES KNOWN

English, Hindi, Marathi.

DECLARATION

This is to declare that the information submitted above is true and correct to the best of my knowledge and belief and nothing has been concealed or distorted.

Yours Sincerely,

Shital D. Zele