**NAME: BHAVNA SAINI**

**e-mail :** [flora26nov@yahoo.co.in](mailto:flora26nov@yahoo.co.in) **Mobile no-** 7208098901

**CURRICULUM VITAE**

**Personal Financial Planner & Investment Advisor**

**CAREER CONSPECTUS**

* Personal Financial Planner & Investment Advisor with more than Three years of Experience.
* Dependable and Reliable MBA Graduate who is attentive to detail and produces Quality Work.
* Reputation as a Self Directed Professional with Excellent Problem Solving, Communication and Management Skills.
* Computer Literate with Proficiency in MS Office.

**EMPLOYMENT HISTORY**

**Company :** MAXLIFE INSURANCE CO. LTD.

**Duration :** July 2011- To Present

**Designation :** SALES MANAGER

**Job Profile :** Bancassurance ( AXIS BANK )

* Responsible for Acquisition of New Clients and also Service the Existing Clients.
* Providing Financial Planning & Investment Advice.
* Advice and update clients on various products and Investment Opportunities.
* Profiling Customers and provide financial products to Meet Customer Needs.

**COURSE DETAILS**

**Course : Master of Business Administration (MBA) (2009-11)**

**Institute : PDVVPF’s Institute of Business Management And Rural**

Development, Ahmednagar, Maharashtra

**Specialization:** **Finance**

**EDUCATION QUALIFICATION**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Qualification | Institute | University / Board | Year of Passing | Percentage |
| MBA | IBMRD | Pune | 2009-2011 | 62.36% |
| B COM | **HR College of Commerce And Economics** | Mumbai | 2005-2008 | 67.23% |
| H.S.C. | **K V NO. 1, Colaba Mumbai** | **CBSE** | 2004-2005 | 84.6% |
| S.S.C. | **K V NO.2, Kochi** | **CBSE** | 2002-2003 | 67.4% |

**PROJECTS UNDERTAKEN DURING ACADEMICS**

**SUMMER INTERNSHIP**

**Organization:** Altus Capital Advisor Pvt. Ltd.

**Duration :** 2 months

**Project Title :** Gold – Decades Best Performing Investment

**Reporting :** Mr. Pavan Yadav, Director

**SKILLS**

* Financial Need Analysis
* Business Planning and Forecasting
* Client Relationship Management
* ANIIT (MIS) Churchgate, Mumbai

**ACHIEVEMENTS**

* Achieved 150% of Financial Year 2014-2015 Target.
* Achieved 120% of Quarter Targets from last 2 years in MAX LIFE INSURANCE COMPANY LTD.
* Received MEGA STAR TROPHY AND CERTIFICATE from MAX LIFE INSURANCE COMPANY
* Stood Second in MBA (2009-2011)
* Stood First in 1rst year MBA
* Stood First in 12th class
* Stood First in 11tth class

**EXTRA-CURRICULAR ACTIVITIES**

* Attained Certificates in Hindi Elocutions & various other Cultural Activities.
* Organizing, Anchoring National Level and State Level Seminars & Events.
* Participation in various Group Dances, Group Songs.

**PERSONAL DETAILS**

**Date of Birth :** 26 November, 1987

**Address :** 201 Radha Krishna Apartment, Plot No. 29/30, Sector-8, New Panvel, Navi Mumbai-410206.

**Gender :** Female

**Marital Status :** Single

**Languages Known:** English, Hindi.