**ROHAN MEHTA, CFA Level 2 Candidate** Bangalore, India | +91-78901-33445 | rohan.mehta@finvision.com | LinkedIn | Portfolio

### **Professional Summary**

Detail-oriented **Financial Planner** with 2.5 years of experience in **wealth management**, **investment advisory**, and **risk analysis**. Specialized in building custom financial plans, managing client portfolios, and conducting equity research for high-net-worth individuals. Strong working knowledge of mutual funds, fixed income, and insurance instruments. Currently pursuing CFA Level 2.

### **Work Experience**

**Financial Associate – FinVision Wealth Pvt. Ltd.** **Dec 2022 – Present | Bangalore, India**

* Advised over 60+ clients on personal financial planning and investment options
* Built and monitored diversified portfolios using tools like Morningstar and Excel
* Conducted risk profiling and aligned asset allocation based on client goals
* Supported tax-saving strategies and mutual fund recommendations

**Junior Analyst (Internship) – Axis Mutual Fund** **Jan 2022 – June 2022**

* Performed market analysis and created performance comparison reports
* Assisted in research reports for fixed-income portfolios

### **Education**

**MBA – Finance** Christ University, Bangalore | 2020 – 2022

**BBA – Finance** Symbiosis International University | 2017 – 2020

### **Skills**

* **Financial Tools**: Excel (Advanced), Bloomberg Terminal, Morningstar, Zerodha Coin
* **Core Skills**: Financial Planning, Wealth Management, Risk Profiling, Portfolio Optimization
* **Certifications**: NISM Mutual Fund Advisor, IRDA Insurance Agent License

### **Certifications & Licenses**

* **CFA Level 2 Candidate** – CFA Institute
* Certified Financial Planner (CFP) – Module 1 Completed
* NISM Series V-A: Mutual Fund Distributor Certification

### **Key Achievements**

* Managed ₹1.2 Cr in client assets with 18% YoY return on long-term equity portfolio
* Hosted a workshop on “Personal Finance for Gen-Z” with 200+ attendees

### **Languages**

English, Kannada, Hindi