

AARTI SAWANT

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aarti.s1202@gmail.com

Career Objective

To grow in a progressive organization where the blend of my knowledge and enhanced professional skills can help in achieving the goals of the company. I would like to exploit my potential and sense of obligation for the benefit of the organization.

Work Experience Summary

☐ Worked in Vete Associates Tax and Investment Consultants Pvt. Ltd.

Designation: Customer Support Associate

From: Aug 2016 to till date

The Job Roles:

- Preparing **MIS report** as per management requirement.
- Hands on Experience on **Investments software's** like Invest Well, Wealth Magic, VM Pro etc....
- Making Policy data entry from Portal into Software's used by the company.
- **Reconciling Mutual Fund AUM & SIPs** on Bi-Weekly basis in Invest well & in Wealth Magic.
- Preparing **Monthly, Quarterly & Yearly Completed Business Reports** from Various Applications.
- Hand-on experience in **Salesforce CRM**.
- **Registering Customer on BSE & NSE** Online portal for Mutual Fund Investments.
- **Generating various reports** related to Customer's, Back Office & Management from applications.
- Maintaining Clients database for sending monthly newsletter using **mail merge (Wealth Formula)**
- Sending **Wealth Portfolio reports to Client s** as per their requirements
- Training Provided to New Employee of CRM Used by The Company.
- Handling Customer Queries Related to Their Mutual Fund Investment.

☐ Worked in Rishabh Textiles

Designation: Admin & Back Office Executive

From: April 2015 to July 2016

The Job Roles:

- **Client query resolution** over the phone
- Making Purchase & Sales (Textile Machinery) bills & data entry into Excel.
- Preparing Employees Salary Cheque & get sign.
- Maintain Stock Inventory & calculation Unit price of all stocks.
- Maintaining Outward Stock inventory.

Education

- **M.com** from Mumbai University in Jan 2020.
- **B.CAF (Accounting & Finance)** from Mumbai University, with 65% in 2016.
- **H.S.C** from Mumbai University, with 66.33% in 2013.
- **S.S.C** from PVHS School, Thane with 82.18% in 2010.

Technical Skills Certification

Well versed in Microsoft Word, Excel. NISM SERIES V A Mutual Fund Distributors Certification Examination

Personal Strengths

- ☐ Good communication skill.
- ☐ Have passion to learn new things and ability to grasp the subject.
- ☐ Self-motivated and fast learner.
- ☐ Ability to work in flexible hours.
- ☐ Hardworking, perseverance in work related problems, punctual.

Hobbies

Listening Music, Travelling, watching movies, learning new things.

Personal Information

Date of Birth : 12th Feb 1994
Gender : Female
Marital Status : Unmarried
Current Address : B – 103, Lalit Apt, Raj Park, Parsik Nagar
Kalwa Thane (w) 400605
Languages Known: English, Marathi & Hindi.
Last CTC : Rs. 4.26 LPA

Declaration

I hereby declare that the above furnished details are true to the best of my knowledge & belief.

Aarti Vivek Sawant