## Ms. Harshada Patel

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## Mobile No: 738193479 / 8655483626

## E-Mail: [Harshadapatel758@gmail.com](mailto:Harshadapatel758@gmail.com)

## Date of Birth: 05/05/1995 | Nationality: Indian

## Gender: Female | Language Known: English, Hindi, Marathi & Gujarati

**Career Objective**

Passionate about delivering exceptional and delightful service. To work in a firm with a professional work driven environment where I can utilize and apply my knowledge, skills which would help me to grow while fulfilling organizational goals.

**Professional Summary**

* An experienced Mutual Fund Advisor having considerable success in advising high net worth individuals and corporate clients on investments.
* Over 5 years’ experience in providing financial services and assisting clients in making informed decisions by showing them various options and helping them to assess the merits of different plans.
* Possessing in depth knowledge of **Insurance Products, Investment Strategies** and working hard to provide a high-quality, customer-driven-focused service.
* Currently working in Investment Team, Handling Clients investment portfolios, recommending mf, rebalancing the portfolio, recommending asset allocation

**Professional Skills**

* Strong interpersonal skills demonstrated by an ability to develop good working relationship with management and peer group colleagues.
* Banking operations
* Proven experience in delivering strong results.
* Team Handling.
* Ability to demonstrate effective communication skills to clients.
* Communication & Presentation: Exceptional interpersonal skills. Communicate and interact well with individuals at all levels.
* Computers & Administration: Proficiencies include MS Office, Internet research & Applications

**Professional Experience**

* **Kotak Mahindra Bank Ltd – Investment Advisory Expert - June 2017 till the date.**

**Job Profile –**

**CEC – Mutual Fund Advisor**

**Grade - Deputy Manager**

* Advising Mutual Funds and Recommending SIPs taking into account of Client Goals Planning.
* Updating Customers with Regards to Current Market Situations.
* Providing client service to existing customers by managing all aspects of customer relationships.
* Currently working in Investment Team, Handling Clients investment portfolios, recommending mf, rebalancing portfolio, recommending asset.
* Meet with customers to review financial situation and create investment strategies that help them achieve their long term goals.
* Strong understanding of banking policies.
* Work with bank to executive financial plans including the purchase of insurance, mutual funds.
* Manage and monitor executive investment portfolios.
* Managing data coordinating with data uploaded and assigning to team members training team members.
* Remained updated on all financial products.
* Managed in-person over the phone and email inquiries timely manner.
* Contacted existing customer via email with on new banking products and Help customers to make informed investment decisions.
* Ensured that Client received the best available rates.
* **Aegis Limited. – Investment Advisory Expert - June 2016 – March 2017.**

**Job Profile:**

**Customer Service Executive.**

**Reliance Mutual Funds (MBP, Ghansoli)**

* A good performer worked with distributorship firm.
* Informing clients about upcoming NFOs and guiding them about mutual funds with diversified portfolios.
* Informing clients to get empanel with Reliance Mutual Funds to connect and have a stronger database.
* Experienced in communication with clients and managing their portfolios.

**Academics**

* B.Sc. in Information Technology.

Vpms RZ shah College. Mumbai University (2016) - First Class

* H.Sc.(Science)

Vidya Prasarak Mandal Junior College. Mumbai University (2012) - Second Class

* S.Sc.(State Board)

Smt. Hirbai Morarji Gala English School. Maharashtra board (2010) - First Class

**Professional Courses**

* IRDA certified 2017.
* Nism VA certified 2017.
* MS – CIT certificate in keerti Institute, Mumbai 2012.

**Achievements**

* Awarded Best sale Topper performer for the H1 Quarter Fy-2019-2020.
* Achieved Highest Sales for the Month of APRIL 2019, JULY 2019, AUGUST2019.

**References**

Available on request