

# NIDHI CHOUDHARY

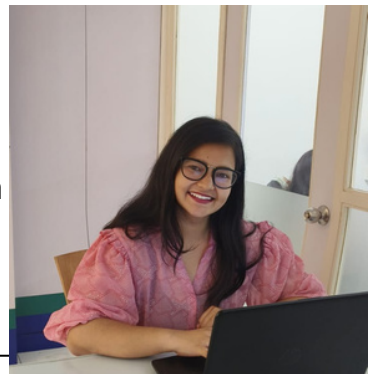
## WEALTH MANAGER

Address - Sector 6 Shanti Garden Mira Road , Mumbai, 401107 , Maharashtra

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Phone - 6203606192



### ABOUT

Result -driven wealth manager with 7 months of experience delivering tailored financial solution to high-net-worth to individuals. Dedicated and client-centric Wealth manger with a passion for creating personalized financial plans that align with clients goals. Skilled in financial planning, and relationship building.

### EDUCATION

#### 1) Higher Secondary

##### Examination, ICSE

St.Joseph's School (2016)

Pakartalla, Kahalgaon

BIHAR

Percentage: 58%

#### 2) Senior Secondary

##### Examination, Bihar Board

Saryug College Samastipur

(2018)

Percentage: 63.40%

#### 3) Under graduation : B.com

##### ( Finance & Accounting)

Tilkamanjhi Bhagalpur

University (2021)

Percentage : 63.88%

#### 4) Post-Graduation: M.COM

##### (Finance & Accounting)

Birla Global University (2024)

CGPA : 6.75

MAY 2024

### EXPERIENCE

#### • Wealth Manager

##### DREAMS FINCO FINANCIAL CONSULTANCY FIRM

- Client Acquisition & Relationship Management
- Ongoing portfolio monitoring and rebalancing
- Portfolio performance reporting
- Making a investment recommendation

### INTERNSHIP ( JUNE 2023-

### AUGUST 2023).

Research and business  
development associate

Praedico Global Reserach Pvt. Ltd.

- Study on Indian stocks market
- Analysing of stocks by  
fundamental and technical  
analysis.
- Generating leads in social media  
and contacts.

### CERTIFICATION

Topic : Digital Transformation ( Impact of  
digital transformation in finance sector)

Human Resources Analytics Certification  
from Cousera.

## **SKILLS**

- COMMUNICATION
- TEAMWORK
- TIME MANAGEMENT
- INVESTMENT ANALYSIS
- FINANCIAL PLANNING
- CUSTOMER RELATIONSHIP  
MANAGEMENT (CRM)

## **HOBBIES**

BADMINTON  
DANCING  
COOKING