

Jyoti Prakash Nayak, CFP

Summary

9+ years of extensive experience (India & Abroad) in Banking, Real estate, Insurance and Combat Services Support. Certified Financial Planner with expertise in comprehensive Financial Planning and Financial Advisory services.

A Science Graduate, also holds a Master's Degree in Business Administration (MBA). Started career with Allianz Bajaj Life Insurance Co. Ltd. in 2003. during the 2 years, stint with insurance, advanced from Insurance Care Consultant to financial planning.

With banking experience coupled with in-depth knowledge of financial products and wealth management, set out to become practicing financial planner.

A speaker at seminars on "Art of Financial Freedom" at various corporates, has been awarded CFP (CERTIFIED FINANCIAL PLANNER) certificate by Financial Planning Standards Board India (FPSB India) for expertise in Personal Financial Planning.

Specialties: Comprehensive financial planning comprising

- Emergency Planning
- Risk Planning
- Investment Planning
- Retirement Planning
- Goal-based Planning etc.

Experience:

Dilzer Consultants Financial Planning & Investments

Para-Planner

Aug 2018---Present Bangalore Area ,India

Financial Planning Of the HNI Client

- Investment Planning
- Retirement Planning
- Goal based Planning
- Insurance Planning

RELATIONSHIP MANAGER

FUTURE GENERALI LIFE INSURANCE CO.LTD

July 2017—July 2018 Bangalore Area ,India

- **Insurance Planning & sales**
- **Investment Planning**
- **Retirement Planning**
- **Goal-based Planning**

SALES MANAGER

EXIDE LIFE INSURANCE CO. LTD.

January 2015 – June 2015 Bangalore Area ,India

- Recruiting and managing Insurance Advisors of the team
- Retirement Planning for Clients
- Training and motivating the team members for effective Insurance Business
- Setting target for sales team etc.

SENIOR BUSINESS EXECUTIVE

AXIS SECURITIES AND SALES LTD

September 2010 – February 2012 (1 Year 5 Months) Bangalore Area , India

- Training and Mentoring of team members
- Managing day to day team operations
- Achieving team targets
- Business development
- Organizing and delivering seminars on online trading at different corporates
- Providing service to existing clients based on execution of their stock trading

Award/Achievements:

- Got an appreciation certificate for consistency performance in the field of ‘Opening of Demat Account’ in KARNATAK region.

TEAM LEADER

TRAHI JAGANNATH CONSTRUCTIONS Pvt.Ltd

December 2008 – August 2010 (1 Year 8 months) Bhubaneswar Area, India

Responsible for end to end sales of property for clients starting from initial consultation session, managing a team and presenting suitable property plans, executions, observing periodic sales review and achieving overall team targets.

- Establishing client relationships
- Gathering client requirements, including their demand and associated budget profile
- Evaluation of property status including analysis of assets, market condition, price negotiation, current legislation and regulation strategies
- Motivating and managing team for property sales
- Addressing client concerns and revising revenue as appropriate
- Implementation of business development plans
- Monitoring of team performance for achievement of goals
- Reviewing of plan and re-balancing between targeted business

Supply Associate-II

CSA LTD.

April 2006 – August 2008 (2 years 4 month) Arifjan Area, Kuwait

- Responsible for team management
- Meeting branch targets
- Audit compliance
- Support to US Army armaments
- Providing administrative support to Shipping Branch Manager, including preparing and distribution reports and other material ordering of U.S. Army Heavy equipments (U.S Army Automobiles)
- Handling 7 members team for support and services of US Army Stuffs.

- Maintaining files in accordance with the Army Records Information Management System (ARIMS) and organize assembled documents to include Power Point presentations and produce presentations material for various meetings
- Trains new personnel on the proper use of Portable Data Collection Device (PDCD), and assists the Supply Associates in the planning and prioritization of the daily work assignments.
- Assists in the translation and understanding of SOPs, POPs and classes etc. when given to the Eastern work force.
- Verifies products against the Material Release Order (Nomenclature, NSN, Unit of Issue, Quantity, Condition Code, etc) before pulling from location or shipping to customer.

Insurance Care Consultant

ALLIANZ BAJAJ LIFE INSURANCE CO. LTD.

December 2003 – January 2006 (2 years 1 month) Bhubaneswar Area, India

- Handling independently insurance requirement of different customers
- Meeting consistently sales targets of different insurance products
- Performing administrative task such as maintaining records and handling policy renewals.
- Sourcing new clients through different medium.
- Attending meeting, seminars and different programs to aware of new insurance products.
- Advising clients on suitable insurance plan according to their investment needs and suggesting them various avenues of investments.
- Give services to clients according to their requirements
- Making good relationships with clients.

Personal Details:

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