AKSHATA PALAV

PERSONAL PROFILE

A driven and ambitious young professional with the ability to work under pressure and consistently deliver on time.

My objective is to become an accomplished finance professional with an excellent track record of directing operations, employee development, customer relations etc. thereby channelizing my skills and capabilities towards the achievement of organizational objectives.

SKILLS & ABILITIES

- Motivated & well-disciplined individual.
- Problem solving ability.
- Attention to detail.
- Leadership.
- Adaptability.
- Time management.
- Team Player

TECHNICAL SKILLS

- Good knowledge of MS Office

CONTACT INFORMATION

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ADDRESS:
Discovery Gardens, Dubai, United Arab Emirates.

EDUCATION & PROFESSIONAL ATTAINMENTS

- Completed all modules of the **Certified Financial Planner (CFP)** course from the Financial Planning Standard Board (FPSB).
- Attained **3 Specialist Certificates (Investment Planning Specialist, Risk and Estate Planning Specialist, Retirement and Tax Planning Specialist)** from FPSB on clearing the CFP core modules.
- Bachelors in Management Studies **(BMS with specialization in Finance)** from Valia College, affiliated to the Mumbai University.
- Successfully completed **MSCIT certification** course from YMCA, India.

WORK EXPERIENCE

Focus to Growth MFD LLP (Associated with NJ India Invest Pvt Ltd)
Wealth Manager [July 2018 – February 2021]

- An energetic, enterprising and dynamic Wealth manager with excellent communication, effective managerial capabilities and a firm determination to gain new insights in the areas of financial analytics and wealth management.
- Headed the Client Operation & Relations department for 3 Years.
- Successfully trained and onboarded over 10+ new joiners resulting in improved team performance & enhanced customer service.
- Handled assignments independently, supervised and reviewed the work done by juniors and have given direct reviews to partners.
- Actively assisted clients in identifying goals and provided suitable investment advice.
- Actively coordinated with clients in arranging for various requirements and resolving their investment related grievances.
- Associated with analysis and compilation of draft asset allocation schedules.
- Managed FATCA, KYC, partner desk, previous broker folios, E-wealth, PMS account related compliances.
- Led multiple assignments simultaneously, achieving overlapping priorities considering risk, importance and urgency.
- Handled investment portfolio of various clients including overseas clients under the direct supervision of the Business head.
- Key role in the overall planning, client co-ordination and closure of the assignments including preparation of critical internal and client deliverables like portfolio summary, mutual fund valuation report, capital gains report.

ADDITIONAL INFORMATION

- **Personal Profile:** Date of Birth: 24th October 1997, Marital Status: Single.
- **Languages Known:** English, Hindi & Marathi.
- **Interests:** pro bono consulting, Jogging, cycling for physical fitness, reading self-help books for motivation and peace of mind.