

CURRICULUM VITAE



**DEEPAKKUMAR
VISHWAKARMA**

Corresponding Address:

404, C-wing, Shanti Nagar,
Building no. 2, Yashwant
Gaurav Road, Nallasopara
west, Palghar-401203

Permanent Address:

Room no.16, Pawan Ramasare
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maharashtra,mumbai-401208

E-mail:

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Contact No. : +91 9833886059

Personal Information:

Date of Birth : 04th April, 1995

Mother's Name : TARADEVI

Father's Name : MANOJKUMAR
VISHWAKARMA

Sex : Male

Nationality : Indian

OBJECTIVE

It is my desire to get associated with an organization that can help me grow professionally and on a personal level. I wish to work in a competitive environment which gives me new challenges and frontiers to overcome and explore.

PROFESSIONAL QUALIFICATION

QUALIFICATION	SPECIALIZATION	COLLEGE	YEAR OF PASSING
MBA- Financial Planning	Financial Planning	International College of Financial Planning	2016-2018
MUTUAL FUND (DISTRIBUTOR)	CLEARED	NISM	Mar- 2020
Capital Market (Dealer module)	CLEARED	NCFM	Nov- 2017

ACADEMIC QUALIFICATION

- **Bachelor of Commerce** from University of Mumbai, Mumbai.
- **HSC (Maharashtra board)** from Swami Vivekanand Jr. Collage, Mumbai
- **SSC (Maharashtra board)** from Shivaji Vidya Mandir High School, Mumbai

AREA OF INTEREST

- Financial planning
- Mutual Fund
- Insurance
- Fixed income
- Equity/Capital Market

COMPUTER PROFICIENCY

- MS WORD, EXCEL, POWER-POINT
- Investwell software
- Mutual fund online platforms, NSE NMF-II, BSE StarMF MFU, iFast, CAMS, KARVY.
- Equity online platform- Sharekhan/Upstox/Kotak Securities
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CO- CURRICULAR ACTIVITIES

- Participation in singing competition at state level from Ghanshyamdas Saraf College.

Marital Status: Married

Languages Known : English, Hindi, Marathi.

Hobbies : Cooking, Playing chess.

Passport Status: NA

WORK EXPERIENCE

Plan Ahead wealth advisors Pvt. Ltd., Andheri, Mumbai (Sep-2017 to Jul-2019) (Financial Service Advisor)

Key Result Areas

- ◆ *Daily MIS updation Process.*
- ◆ *Daily Client's transactions execution.*
- ◆ *Daily RTA Data Updation.*
- ◆ *Preparing and Checking Forms related to Mutual Funds, Fixed Income, PMS, Bond, Equity Investments for resident and NRI clients.*
- ◆ *If any queries, informing clients immediately and Provide prompt solution on Client queries. .*
- ◆ *Tracking Clients queries.*
- ◆ *Daily updation of MIS and online investment portal to Reporting Manager.*

Bajaj Capital Ltd., fort, Mumbai (Aug-2019 to Oct-2020) (Relationship Manager)

Key Result Areas

- ◆ *Selling of financial products like Mutual Funds, Insurance, Company Fixed Deposits and other Retail Bonds issued by RBI or Companies.*
- ◆ *Acquiring new clients and meeting prospects on a daily basis.*
- ◆ *Updating client risk profiler and provide financial advice to Clients.*
- ◆ *Preparing and checking Forms related to Mutual Funds, Fixed Income, Bond, Investments for clients.*
- ◆ *If any queries, informing clients immediately and Provide prompt solution on Client queries. .*
- ◆ *Tracking Clients queries.*
- ◆ *Daily updation of MIS and internal portal.*

Noteworthy Highlights

- ◆ *Proven contributor of the reporting branch's revenue on MoM basis.*
- ◆ *Over achieved targets in the first Six months & qualified for a Neev Program as salary increment.*

7ICAP SERVICES LLP, Vikroli, Mumbai (July-2021 to till date) (AVP- Admin, Execution and Compliance)

Key Result Areas

- ◆ *Daily MIS updation Process.*
- ◆ *Daily Client's transactions execution.*
- ◆ *Daily RTA Data Updation.*
- ◆ *Monthly Brokerage reconciliation.*
- ◆ *Monthly Invoice Preparation and Partners query handling.*
- ◆ *Preparing and Checking Forms related to Mutual Funds, Fixed Income, Bond for resident and NRI clients*
- ◆ *Compliance*

Noteworthy Highlights

- ◆ *SOPs preparation for new updation or required information*
- ◆ *Helping IT team to solve the query if any*
- ◆ *Observation and RM Meetings*

DECLARATION

I hereby declare that all the above given information are true and correct to the best of my knowledge.

Place:- Mumbai

(DEEPAKKUMAR VISHWAKARMA)