Sagar Maheshwari
Pursing MBA Executive (Applied Finance and Digital Marketing) |
Certified Financial Planner™ | B.A Economics

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Versatile Senior Manager with 6+ years of rich experience focused on sales, client relationship management, process improvement, continuous business and professional improvement. History of cultivating an open culture with the free exchange of information. Pursuing new professional challenges with a growth-oriented company. Offering advanced planning, problem-solving, strategy and presentation skills.

Skills

Business Development | Leadership | Portfolio Management | Sales Expertise | Wealth Management | Relationship Building and Management | Client Service and Support | Team Building | Training and Development | Problem Resolution | Process Improvement | Workflow Analysis | Automation

Professional Experience

Emkay Global Financial Services - AVP Wealth Management **Nov 2022-Present**

- Customer Acquisition Minimum of 1 crore and above investable surplus
- Financial Planning (FP) and Portfolio Services
- Manage Private Wealth, PMS and AIF fund related queries.
- To develop short term and long-term sales strategies for the WM business in line with the overall strategic goals of the organization
- Ensure discipline of asset allocation
- To drive strong client servicing and client engagement parameters, to enhance market credibility and deliver superior value proposition.
- To closely observe, evaluate and monitor the client positions, portfolio allocations and ensure that they fall within risk and advisory parameters as laid down by Risk, Compliance and Research Teams
- To ensure adherence to internal and external Financial advisory guidelines and Risk Policies and ensure standards are in place to minimize mis-selling instances.

Jagoinvestor.com – Senior Manager **Jan 2019 – Oct 2022**

- Created objectives for Sales, Wealth Management and Backend teams to streamline the work and prevent over lapping and better communication.
- Handling 200 clients directly with an AUM of Rs 80 Crores. Overlooking an AUM of another 120 Crores handled by 4 team members.
- Identified new business opportunities and led the launch of new services.
- Resolved challenging client complaints to satisfaction, promoting brand loyalty and maximizing client retention.
- Analyzed business data and provided feedback to management on which sectors to focus on resulting in more revenue per client.
- Improved the flow of the overall processes and implemented the same in CRM, explored new apps and software to improve team efficiency.
- Resolved customer service issues by finding immediate solutions, increasing customer confidence and

decreasing escalations to the executive office.
- Evaluated employee performance on monthly basis and coached and trained team members, increasing quality of work and employee motivation.
- Implemented various new processes to streamline workflow within the team, averaging 1-2 hours of additional productivity per day.
- Coached employees in successful selling methods and encouraged cross-selling to drive revenue.

Jagoinvestor.com – Senior Financial Planner **Jan 2018 – Jan 2019**

- Worked with HNI customers to understand needs and provide customized service.
- Exceeded sales target by 100 % by employing consultative sales tactics and superior customer service.
- Took initiative to improve service quality and structure.
- Mentored Junior Financial Planners to improve performance, knowledge and customer service.
- Cross-trained existing employee to maximize team agility and performance.
- Organized offline workshops and events for investor awareness and education.

Jagoinvestor.com – Financial Planner **Oct 2016 – Jan 2018**

- Build and managed Rs. 25 Crore. in client investment portfolios by providing one-on-one service to clients to understand assets, expenses and long-term as well as short-term investment goals to devise a personalized financial plan.
- Worked with more than 250+ clients
- Educated clients on various financial matters and provided professional recommendations on investment opportunities, products and services based on each client's individual needs.
- Cultivated and strengthened relationships with new clients and educated clients on account services and capabilities.

IT Skills

MS Excel | MS Word | MS PowerPoint | ZOHO CRM | ZOHO Flow | Zapier | NSENMFII

Education

- Pursuing MBA Executive (WX) from NMIMS in Applied Finance and Digital Marketing
- Certified Financial Planner from Financial Planning Standards Boards of India in 2016
- Actuarial Science (CT1 and CT7) from Institute of Actuaries of India from 2014-2016
- Bachelor of Economics from St. Xavier's College Jaipur from 2011-2014
- Class 10th & 12th from National Academy School Alwar from in 2009 and 2011 respectively.

Other Work

- Volunteered in Rays – NGO for HIV +ive Kids.
- Organized National Level College Fest in 2012 and 2013.
- Worked as Vice President of Economics Council 2013-2014.