





KOMAL SHAH

CFP CM

 7977582088


 komal.paresh.nism@gmail.com

 Borivali, Mumbai

Education

CFP CM


Financial Planning Standards Board


 17/02/2020

- Investment Planning
- Insurance Planning
- Retirement Planning, Employee Benefit
- Tax and Estate Planning
- Advanced Financial Planning

B. COM

N.K. (N.L.) College

 2015 to 2018

 Malad, Mumbai

- Participation in 50+ distinguished Inter-College and Intra-College Competitions

CFA LEVEL 1 CANDIDATE

- Level 1 Examination in November 2023

Certifications

NISM

- Investment Advisor Series: 10A, 10B
- Mutual Fund Series: 5A, 5B, 5C

Experience

INVESTMENT CONSULTANT

Naik Wealth

 24/02/2022 to Current Date

 Goregaon, Mumbai

- Scheme Proposal
- Mutual Fund Scheme Analysis
- Stock Analysis
- Fund Manager Call
- Digital Marketing
- Macro Economic Analysis

GROWTH CO-ORDINATOR

Naik Wealth

 18/02/2022 to 23/02/2022

 Goregaon, Mumbai

- Scheduling Client Meetings
- Processing Transactions

INTERNSHIP IN TRAINING AND DEVELOPMENT

Financial Planning Academy

 20/07/2020 to 31/10/2020

 Borivali, Mumbai

- Doubt Solving for students appearing for CFP Exam
- Making CFP Curriculum Content