NITIN. B. PANCHAL

202-B, MANGALMURTI APT,

LIBERTY GARDEN RD NO-1,

MALAD (WEST), MUMBAI-400064

Mob. No-9833546427

**n.panchal@rediffmail.com**

** CAREER OBJECTIVE: -**

Acquiring requisite professional knowledge through a dedicated and focused approach in your Esteem organization and serve professional services to your Clients to grow business.

 **ACADEMIC CREDENTAILS: -**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **QUALIFICATION** | **YEAR OF**  **PASSING** | **NAME OF**  **SCHOOL/COLLEGE** | **NAME OF UNIVERSITY** | **PERCENTAGE** |
| T.Y.B.COM | 2003-04 | MITHIBHI COLLEGE  OF COMMERCE  VILE PARLE(W) | MUMBAI UNIVERSITY | 64% |
| H.S.C. | 2000-01 | MITHIBAI COLLEGE  OF COMMERCE  VILE PARLE(W) | MUMBAI UNIVERSITY | 61% |
| S.S.C. | 1998-99 | SHETH. N.L. HIGH  SCHOOL MALAD(W) | MUMBAI BOARD | 74% |

* CLEAR **CIEL Wealth Management-Basic** MODULE.

 **WORK EXPERIENCE: -**

* 1. **PAYTM MONEY**

Designation- AGM-Product Manager-PMS and AIF

Job Profile-

* Working with the HNI Client segment to advise them to select the Right PMS/AIF Strategy.
* Conducting Webinars and Events to educate investors on Alternate Investments,
* Design product strategies to highlight on social medias. Focus on increase the User for PMS/AIFs.
* Handling the Product updates in App and Web portal on regular basis.

Duration- February 2022 to October 2022

* 1. **BANK OF BARODA CAPITAL MARKETS**

Designation- Sr. Manager-Regional Investment Counselor

Job Profile-

* Working with Banks Top Clients --HNI Customers, advising about Investments Ideas, Opportunities in Markets for Invest and sharing views and updates based under research reports.
* Handling Mumbai’s Branches of Banks and drives sales through Branch HNI Customers Base. Coordinating with Branch Managers, RBH and Radiance RM and give training and recommendations based under Research Platform.
* Working closely with Research team for regular updating of Knowledge inputs and same sharing with Branch employees. Arranging IAP programs and handling all related activities from budgeting, planning, delivering and MIS maintains.
* Promote new products and managers and comprehensively monitor existing ones
* Working towards agreed revenue targets

Duration- From November 2017 to January 2022

* 1. **HDFC BANK – PRIVATE BANKING GROUP**

Designation- Manager-Regional Investment Counselor

Job Profile-

* Working with Banks PBG- Wealth Management Division for HNI Customers, advising about Investments Ideas, Opportunities in Markets for Invest and sharing views and updates based under research reports.
* Handling Branches of Banks and drives sales through Branch Customers Base. Coordinating with Branch Managers, RBH and RM and give training and recommendations based under Research Platform.
* Working closely with Research team for regular updating of Knowledge inputs and same sharing with Branch employees. Arranging IAP programs and handling all related activities from budgeting, planning, delivering and MIS maintains.
* Advices to HNI and Ultra- HNI Client Group, Client Advisory and servicing them for their Investments and Portfolio reviewing, Ratification and provide full fledge Financial planning as per Risk profiling of Investor.

Duration- From Oct 2016 to Nov-2017

* 1. **INDIA INFOLINE LTD**

Designation- Sr.Manager- Investment Analyst.

Job Profile-

* Work closely with Research team and Coordinating with HNI Customers for Investments Ideas, Opportunities in Markets for Invest and sharing views and updates.
* Advices to HNI and Ultra-HNI Client Group, Client Advisory and servicing them for their Investments and Portfolio reviewing, provide full fledge Financial planning and Wealth management service.
* Products includes Equity advisory, Mutual funds, Debt products, PMS, Real estate, Commodity, Structure products, WILL Strategy, Financial Planning and many other Financial related products based as per Investor’s risk profile.
* Conducting Investments Awareness Programs on regular basis for Knowledge upgradation and Business Developments. Arranging IAP programs and handling all related activities from budgeting, planning, delivering and MIS maintains.

Duration- From December 2013 to Sep-2016

* 1. **RELIGARE PRIVATE WEALTH**

Designation- Sr. Manager

Job profile-

* Work as Manager and Servicing HNI Investors for Western Region.
* Actively involved for Client Advisory and servicing them for their Investments and Portfolio reviewing, provide full fledge Financial planning and Wealth management service to HNI segment.
* Provide Risk based Investment advisory to HNI clients and regularly maintain the relationship with Clients for business prospects.
* Products includes Equity advisory, Mutual funds, Debt products, PMS, Real estate, Commodity, Structure products, and many other Financial related products based as per Investor’s risk profile.

Duration- From Jan 2007 to Nov-2013

* **DETAILS OF COMPUTER STUDIES: -**

Completed Windows 98, Word, Excel, and Power Point from **RAJ COMPUTERS ACADEMY** Malad (W) branch.

* **EXTRA CURRICULAR ACTIVITIES: -** YEAR

Active member of Student Forum 1999-00

Active member of Cultural Team 2000-01

Member of College Cricket team in inter college 2001-02

Cricket tournament

Member of college’s Blood donation team 2003-04

* **SKILLS: -**

(1) Analytical skills

(2) Computer skills

(3) Marketing skills

(4) Public Speaker Skills

* **LANGUAGES KNOWN: -**

ENGLISH MARATHI

HINDI GUJARATI

* **DATE OF BIRTH: -**

6th November 1983.

* **HOBBIES: -**

Reading, Playing Cricket

* **NATIONALITY: -**

INDIAN

* **MARITAL STATUS: -**

Married