CURRICULUM VITAE

PARTH H KANANI
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Currently looking for a new and challenging role, where I can do best use of my existing skills/experience and contribute my cent percent towards Organization.

Professional Objective

- Given an opportunity, I have the potential to strive hard for the organization’s gratification to prove myself capable for working in reputed concern, thus achieving personal & organizational goals.
- Seeking an assignment in a stimulating work environment, that encourages continuous learning and provides exposure to new ideas conducive to personal and professional growth.
- Having theoretical knowledge about ESG and ESG analysis

Academic Qualification

- **CERTIFIED FINANCIAL PLANNER (CFP) -[Investment Planning, Retirement Planning & Employment Benefits, Risk Analysis & Insurance Planning, Tax & Estate Planning]**
- **Bachelor’s in Commerce (Accounting & Finance)** from Thakur College of Science & Commerce, Mumbai University, **Distinction with 6.12 CGPA (2018)**
- **Higher Secondary** from Nirmala Memorial Foundation College of Commerce & Science (First Grade with **78.36%** (March 2015)
- **Secondary Education** from ST. Lexicon Global High School, First Grade with **66.55 %(** March 2013)

Professional Summary

1. Currently working with Param Investopedia Pvt. Ltd. (PIPL), Mumbai
Designation- Investment Analyst
Tenure - February 2022- Till Date

Job Profile

Regulatory Reporting

- Managing Client Relationships.
- Managing Wealth of the Clients helping them achieve the desired corpus.
- Analyzing products suited for each client's and fulfill needs.
- Risk profiling and asset allocation
- Financial planning Consultancy & Review portfolio
- Dealing in products such as Mutual funds, Insurance, Loans, Debt products.
- Plan retirement and helping to achieve for the other part of the life.
- Getting involved in all aspects of the transaction process from screening to closing.
- Supporting the structuring and executing investments across multiple sectors.
- Monitoring and tracking operational and financial performances.

2. Associated with KAIROS WEALTH MANAGEMENT, Mumbai

Designation- Senior Manager

Tenure – January 2020 to February 2022. (2 years)

Job Profile

- Equity Dealer
- Managing HNI client's
- Portfolio Management
- Dealing in Mutual funds, Insurance, FD's, Loans
- Helping Sales team to achieve timely targets
- Technical support to the clients

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3. Associated with Vaz Samel & Associates, Mumbai

Designation- Audit Assistant

Tenure –1st April 2019 to 30th November 2019 (8 months)

Job Profile

- Handling the statutory audit team.
- Part of team of GST audit.
- Preparation of Audit report.

Soft skills

- Problem Solving Skills/ Leadership qualities
- Networking / Result Oriented

Personal Snippets

Date of Birth: 20th January, 1998.

Address: 304, Suraj Kiran, Anand Nagar, Dahisar (E) Mumbai 400068

Languages Known: English, Hindi, Gujarati and Marathi

Interest: Music, Cricket

Marital Status: Unmarried

Sex: Male

Nationality: Indian

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

Place: Mumbai **Date: Sign:**