

SAKSHI JAISWAR

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Para Planner | Pursuing CFP

ABOUT

With **3 years of progressive experience** at Wealth Café Financial Services, I've transitioned from a **Financial Associate to a Para Financial Planner**, showcasing a diverse skill set and playing an integral cross-functional role. During this period, I've been involved in drafting comprehensive financial plans covering areas such as Cash Flow Analysis, Money Management, Asset Allocation, Contingency Planning, Goal Planning, Tax Planning — ensuring a personalized approach to each portfolio. Furthermore, I've executed these financial plans with precision. Apart from my core responsibilities, I have **created financial content** and hosted webinars to educate individuals on Personal Finance.

I am honored to be recognized as one of **India's Youngest Top Women in Finance** by Equalifi presented by Valuefy in a promising role in 2023. Looking ahead, I am eager to continue contributing to the world of finance with my passion for client service, financial education, and an unwavering commitment to excellence.

EXPERIENCE

➤ Para Financial Planner, Wealth Café Financial Service (June' 21 – Present)

WCFS - Financial Advisory Group with an objective to spread financial awareness through courses, workshops & personal advisory services.

- Assisted Financial Advisor & the Founder of Wealth Cafe Financial Services.
- Analyzed clients' financial situation, including assets, liabilities, income, and expenses, to **create customized financial plans**.
- Worked for **clients of different categories**: Minor, Senior Citizens, NRI and also participated in inheritance distribution.
- Participated in **drafting financial plans for 30+ clients**, taking into account their unique goals, risk tolerance, and time horizons.
- Independently **managed execution for 70+ clients across various investment products**, including Mutual Funds, Corporate Deposits, and Sovereign Gold Bonds (SGBs), both online and offline, ensuring compliance with regulatory requirements.
- Maintained **strong relationships with clients**, offering ongoing support, regular portfolio reviews, and proactive communication to address their evolving needs.
- Prepared **comprehensive review for 20+ clients** with an average AUM of INR 1 crore, providing annual and quarterly feedback.
- Attended ARIA training and networking events, to stay updated on industry trends and enhance professional skills.
- Developed and executed a content strategy**, overseeing the planning and managing execution of 150+ posts, 90+ reels, and 50+ blogs to build meaningful customer connections and increasing financial awareness.
- Assisted in **planning and designing 8 workshops and 3 courses** to educate individuals and organizations, covering topics such as budgeting, investing, taxation and retirement planning.
- Partnered closely with executives to strategize and develop a long-term plan for enhanced productivity.
- Mentored and **trained 4 interns**, providing guidance and support that enriched my skills in effective delegation.

➤ Intern, SurePrep India Pvt Ltd (Jan'21 – April'21)

SurePrep – US based MNC, leading in 1040 tax automation for CPA firms.

- Verified US tax documents required for filing client's ITR. Clients include Big Four and other well-known companies.
- Supervised 15 interns that had joined the next batch and learnt various managerial and leadership skills.

CERTIFICATIONS

- Completed 3 Modules of FPSB Certified Financial Planner (CFP) (2023)
- NISM VIII – Equity Derivatives (Expires on July'25)
- NISM VB - Mutual Fund Foundation (Expires on Apr'24)
- NISM VA - Mutual Fund Distributors (Expires on Apr'24)

SKILLS

- Executed various investment products, including Mutual Funds, Deposits, and Sovereign Gold Bonds (SGBs)
- Familiar with financial software tools including MProfit, MFCentral, Cams360, KFinTech and various Corporate Deposit Portals.
- Used Zoho Campaigns, WordPress, Mailchimp, and various ticketing platforms for effective communication and marketing strategies.
- Strategically managed social media platforms to enhance online presence and engagement.
- Proficient in creating impactful PowerPoint presentations.

EDUCATIONAL QUALIFICATIONS

| Course (Stream)/Examination | Institution/ University | Year of Passing | Performance |
|-----------------------------|--|-----------------|---------------|
| BMS (Finance) | Vidyalankar School of Information Technology | 2020 | SGPA -9.04/10 |
| HSC (Science) | Sathaye College | 2017 | 60.62% |

PROJECTS UNDERTAKEN

➤ Final Year Project: A study on investment potential on Yes Bank Shares through Financial Analysis (2020)

- Drafted a report, with the help of ratios and company analysis, as there was a continuous fluctuation in Yes Bank's share so as to find out whether to buy, hold or sell the stock based on the analysis.

AWARDS & ACHIEVEMENTS

- Recognized as one of **India's Youngest Women in Finance** by Equalifi in a promising role (2023)
- 3rd Position** - V-SEARCH -A National level Student Research paper Conference at VSIT (2020)
- Consecutive Winner** of Case study competition organized by Bizcon at VSIT (2019 & 2020)