



CONTACT

- 9920624806
- patrarakhi51@gmail.com
- Malad (W), Mumbai, India
- <https://www.linkedin.com/in/raakhi-p>

CERTIFICATIONS

- FPSB® Investment Planning Specialist
- FPSB® Risk & Estate Planning Specialist
- FPSB® Retirement & Tax Planning Specialist
- Cleared CFP® Exam 2024

SKILLS

- Project Management, Process Improvement, Business Development
- Microsoft Office Suite
- Financial Data Analysis, Planning & Management in clients' interests with the highest ethical and professional standards
- Client Relationship Management
- Problem-solving & Decision-making
- Effective Verbal and Written Communication
- Tech-Savvy
- Telephone Etiquette, Virtual Discussions, Presentations
- Creative, Initiative and Resourceful
- Teamwork, Collaboration, Leadership
- Adaptability, Flexibility, Reliability
- Multitasking and Organization, Fast Learner
- Multilingual Proficiency: English, Hindi, Marathi, Odia

RAAKHI PATRA

Skilled in conducting thorough financial plan assessments to optimize clients' financial well-being. Passionate about personal finance, BFSI sector & committed to staying abreast of industry trends and regulations, building strong client relationships based on trust and integrity. Seeking to leverage expertise in financial planning & financial services industry to drive positive outcomes and contribute to the growth of the dynamic organization

WORK EXPERIENCE

● CFP Intern- Content & Product Management

Financial Planning Academy Edutech Pvt. Ltd., Mumbai

Oct, 2023-May, 2024

- Provide exceptional customer service by promptly addressing inquiries, ensuring a high level of satisfaction among clientele
- Gained valuable experience working within BFSI, Edutech industry, applying learned concepts directly into relevant work situations
- Apply industry-specific knowledge to evaluate customer needs and feedback to drive product and service improvements
- Assisted in the design process for promotional materials which contributed to raising brand awareness among target audiences
- Developed organizational skills through managing multiple tasks simultaneously while adhering to strict deadlines
- Actively participate in team meetings, offering insightful suggestions that led to innovative problem-solving strategies
- Engage in Continuing Professional Development programs of Financial Planning Standards Board India under CERTIFIED FINANCIAL PLANNER® certification program to enhance skill set & contribute to overall organizational growth

● Marketing Intern

Upskill, Mumbai

Nov, 2020-Jan, 2021

- Assisted with development of event strategies and tactical plans to promote accomplishment of marketing goals
- Collaborated with team members to help expand marketing channels
- Contributed to social media content

● Tutor

Abraham's Academy, Mumbai

Jun, 2020-Dec, 2022

- Helped students prepare for exams by providing guidance, motivation and encouragement, focusing on reading comprehension, math and critical thinking skills through group tutoring sessions

EDUCATION

- **Bachelor of Commerce in Banking & Insurance** 2024
CGPI: 9.12 Grade: A+
Smt. MMK College of Commerce & Economics, Mumbai

BBI Graduate

- Maintained the position of BBI CR & BBI REPRESENTATIVE, Member of MMK Students' Council for A.Y 2021-24
- Awarded for participating in SEBI NISM National Financial Literacy Quiz'24
- Awarded Best Reader'24
- Awarded for Organising & Participating in Women Gender Development Cell'24 Activites
- Awarded 3rd prize in Saraf's intercollegiate group quiz Currenzo'24
- Awarded for participating in SEBI NISM National Financial Literacy Quiz'24
- Appointed MMK Contingent Leader for BeABanker'21 Intercollegiate National Level Event, Thakur College
- Appointed MMK CL for Banking Conclave'22, Thakur College
- Awarded 2nd Prize Each in: Thakur's Intercollegiate BeABanker'22 Elocution Event; Gurukul's Intercollegiate Business Success Storytelling Event & Business Survival Case Study PPT Event
- Appointed MMK CL & awarded for participating in NSE Finmahotsav'22 National Level Event
- Awarded Certificate of Merit for standing 1st in FYBBI'21-22

12th HSC Secured 87.50% 2021
B.S.G.D.s' Jr. College of Commerce, Arts & Science, Mumbai

10th SSC Secured 84.60% 2019
Kala Vidyalaya High School, Mumbai

- Awarded Certificate of Merit for standing 3rd in SSC A.Y 2018-19
- Participated & won in various intraschool competitions

INTERESTS

Reading, Traveling, Baking, Fitness