SangeetaYadav|Female,24|9028503858|sangeey29@gmail.com,Ambernath-400501

EDUCATION

B.com Hons	R.K.Talreja of Arts, science and commerce, Mumbai University	2020
Class XII	R.K.Talreja of Arts, science and commerce, Mumbai University	2017
Class X	T.M.S High School	2015

WORK EXPERIENCE

Relationship Manager Priyanka Finserve Private Limited	● Conduct interviews to understand clients' financial needs, risk tolerance, and investment preferences ● Develop personalized wealth management strategies, including investment planning, retirement planning, and tax optimization ● Regularly review clients' financial progress and make adjustments to ensure it aligns with their goals ●Offer ongoing financial advice and guidance, including keeping clients informed about market trends and investment opportunities ●Monitor investment performance and manage portfolios	Sept'23- Jun'24
Admin & Accountant Priyanka Finserve Private Limited	● Maintenance of accounts in Tally Prime ● Handling notices of ITR ● Income Tax Return filing ● Maintaining records and preparing documentation ● GST & TDS Filling ● Preparing summary of income report ● Maintaining accounts in Tally	July'23 - Aug'23
Accountant Sachin Mhaske & Associates	● Accounts maintenances and Bank transaction ● MC Cordination & periodical report to MC ● GST & TDS Filing ● Raising periodical maintenance bill and helps in member dues	Mar'23 - July'23
Accountant Kamlesh P Chandora & Associates	● Manage Accounting activities to ensure compliance with accounting principles, policies and external audits. ● Review and analyse the Balance sheet, Income Statement & Cashflow Statement and month end reports. ● Prepare and analyse Projected Financial Statment. ● ITR ,GST & TDS Filling.	Mar'21 - Feb'23

SKILLS

Accounting Skills: Account Finalization, Taxation, Financial Accounting & Auditing

Finance Skills: Asset Management, Portfolio management, Financial Modelling & Tax Planning

IT Skills: MS Office & Tally ERP

Soft Skills: Time management, Attention to detail, Good communication, Client service orientation, Work ethic

CERTIFICATIONS

Zebra Learn: Financial Modelling & Valuations

NISM: NISM VA- Mutual Fund Distributors