



NILESH JADHAV

SENIOR RELATIONSHIP MANAGER

CONTACT

📞 9309433160

✉️ Nileshjadhav2696@gmail.com

📍 Pune, Punawale

EDUCATION

2014 - 2019

PUNE UNIVERSITY

- Batchlor of Mechanical Engineering

SKILLS

- Public Relations
- Teamwork
- Time Management
- Leadership
- Effective Communication
- Critical Thinking

LANGUAGES

- English (Fluent)
- Hindi (Fluent)
- Marathi (Fluent)

PROFILE

Dynamic and result-driven financial professional with 4 year experience in stock market, specializing in managing the financial planning needs of clients. Expertise in mutual funds, stock market investments, and tailored financial strategies to achieve clients short-term and long-term financial goals. Proven ability to build strong client relationships, deliver high-performing investment portfolios, and provide exceptional financial advisory services.

WORK EXPERIENCE

SBI Securities- Sr Relationship Manager JAN 2024 - MAY 2024

- Proper handling of client and other sensitive information.
- Acquired new customer.
- **Achievement - Increase MTF book 3 times within 2 months**

HDFC Securities - Relationship Manager JAN 2023 - DEC 2023

- Provided comprehensive financial planning services to clients, focusing on wealth creation through mutual funds, stocks, and insurance solutions.
- Generated revenue by facilitating equity and F&O trading while maximizing brokerage opportunities across various financial instruments.
- Strategically increases AUM by acquiring new SIPs and driving lump-sum investments in mutual funds.
- Maintained strong client relationships with consistent portfolio reviews and proactive financial advisory, managing a diverse client base.
- Conducted in-depth market analysis to recommend investment options aligned with clients short and long-term financial goals.

Achievement - Qualified for MDRT Bali & Singapore

ICICI Securities- Relationship Manager NOV 2021- DEC 2022

- Proper handling of client and other sensitive information.
- Engage with prospective client's and provide Fundamentally and technically research data.
- In regular basis, evaluate performance in terms of speed of information dispatch, and research accuracy.

Proactive Wealth- Sales and executive JULY 2019 - OCT 2021

- Acquire new clients to boost company revenue.
- Dealing and trade punch in client's account.

CERTIFICATION

- **NISM-Series-VIII Equity Derivatives**
- **NISM-Series-VA Mutual Fund Distribution**
- **NISM-Series-VII Securities Operation and Risk Management**
- **NISM-Series- I Currency Derivatives**
- **NISM-Series-XVI Commodity Derivatives**