

ASWIN TV



CONTACT

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LOCATION

Dubai, UAE

ABOUT ME (B. Com, CMA (USA))

Dynamic and results-oriented professional with emerging experience as an Executive Wealth Manager at Hedge Equities Ltd in Kochi, Kerala, India. Specialized in client relations, operations management, and financial advisory services. Focused on leveraging expertise in financial modelling and forecasting to deliver tailored solutions and drive operational efficiency. Proven ability to thrive in fast-paced environments, streamline processes, and implement innovative approaches to support evolving business needs.

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PERSONAL DOSSIER

Gender - Male

Nationality - Indian

LANGUAGES

- English
- Malayalam
- Hindi
- Tamil

INTERESTS

- Music
- Football
- Cricket

WORK EXPERIENCE

May 2024 –

Executive Wealth Manager

Nov 2024

Key Responsibilities:

Hedge Equities Ltd
Ernamkulam

- Managed daily operations, ensuring efficiency in wealth management processes.
- Developed tailored financial strategies for diverse client portfolios.
- Provided expert advisory on investments, planning, and asset allocation.
- Maintained ethical standards and ensured compliance with regulations.
- Utilized ZOHO CRM for relationship management and improved customer retention.
- Led financial forecasting projects and delivered insights via Excel.
- Ensured KYC compliance through accurate client data management.
- Enhanced skills through Microsoft Office training & delivered impactful presentations on budgeting & forecasting.

CERTIFICATIONS

Investment Advisor Level -1

National Institute of Securities Market

Certification In Financial Service - 2023 - 2024

National Service Scheme - 2016 - 2018

ACADEMIC QUALIFICATION

2023

CMA (USA)
Institute of Management
Accountants

2021

B.Com
Kannur University

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SKILLS

- Team Work
- Operations Management
- Leadership
- Strategic Planning
- Interpersonal ability
- Work Ethic
- Time Management
- Detail Oriented
- Quality Management
- Process Improvement
- Data Analysis

AREA OF EXPERTISE

- Financial Modelling
- Personal Tax & Market Tax
- Strategic Planning
- Market Analysis
- Portfolio Management
- Tax compliance
- Budgeting and Forecasting
- Data Analysis
- ZOHO CRM
- Ethical Standards
- Time Management
- Attention to Detail
- Client Operations Management
- Agile Methodologies
- Project Management
- Analytical Skill
- Business Development
- Risk Management
- Financial Analysis
- Presentation Skills

PERSONAL STRENGTHS

- **COMMUNICATION** - Interpersonal skills – verbal, problem solving and listening skills in any administrative role.
- **SERVICE** - Having a client focused approach skills include patience, attentiveness and a positive language.
- **ORGANIZATION** - Helping others, organizing a to-do list. Prioritizing tasks by the deadline for improving time - management.
- **MANAGEMENT** - Management skills to direct others and review others performance.

INTERNSHIP

Dec 2023 – Jan 2024

Wealth Management & Equity Research

overall grade - B+

Hedge Equities Ltd