

SMITALI SAKA

Professional Summary Experienced wealth manager pursuing certification in financial markets to transition into a financial analyst role. Equipped with 5+ years of expertise in investment analysis, portfolio management, and client relations.

Contact

Phone

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Email

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Address

Katraj, Pune.

Maharashtra.

Education

2015

M.COM

Pune University

2012

B.COM

Pune University

Expertise

- Strategic Portfolio planning
- High-volume client portfolios
- Wealth management
- Budgeting and forecasting
- Preparing financial reports
- Reporting and auditing

Language

English

Hindi

Marathi

Telugu

Experience

Jun24 - Oct24

Nuvama Wealth and Investment Limited

Wealth Manager

Conduct regular meetings with clients to review portfolio performance, financial goals, and any necessary adjustments.

Develop, implement, and monitor customized investment strategies tailored to client objectives and risk tolerance.

Provide expert advice on asset allocation, wealth preservation, and growth strategies.

Maintain a strong professional network with financial advisors, tax consultants, and legal experts to enhance service offerings.

Aug 23 - May 24

PURNARTHA INVESTMENT ADVISORY PVT LTD

Wealth Manager

Helping clients make informed decisions about financial future.

Analysing financial needs of clients and developing tailored strategies to meet goals.

Assisting clients with budgeting and cash flow management.

Recommending specific investments to help clients meet financial goals.

Educating clients on financial topics and best practices.

Monitoring and updating financial plans to comply with client goals.

Feb 2018 - May 2023

SHAREKHAN LIMITED

Equity Dealer

Generating long-term Revenue. Compliance and Reporting: Ensured compliance with regulatory requirements and internal policies. Client Support: Provided exceptional support to institutional and retail clients, resolving inquiries related to trade execution, settlement, and account maintenance. Managed corporate actions such as dividends, stock splits, and mergers, ensuring accurate and timely execution. Trade Reconciliation: Timely clearing and reconciliation of transactions.

Jan 2016 - Dec 2017

GKCA

Audit Assistant

Monitored and analyzed the financial reports of a business enterprises and banks.
Prepared financial reports and ensured compliance with the tax regulations.
Conducted physical verification of Inventories and preparing report for the same .
Advising clients on areas for improvement.

May 2012 - Dec 2015

B B Thorat and Associates

Account Assistant

Performed clerical duties, recording memos, maintain files and organize documents.
Preparing financial reports, such as balance sheets and income statements, invoices, and other documents.
Worked with bookkeeping software - such as Tally ERP9. Handling sensitive or confidential information.
Performing Physical Audit of companies and Co-operative banks and preparing reports for the same
Assisting in filing IT returns, Tax Audit Reports, TDS and VAT

Certification

NISM-Series-XXI-A: Portfolio Management Services (PMS) Distributors Certification.

NISM-Series-V-A: Mutual Fund Distributors Certification Examination.

Skills

Tally ERP 9
MS Office