**CURRICULUM VITAE**

**Khushboo**

[**Khushboo.380486@2freemail.com**](Khushboo.380486@2freemail.com%20)

**Mobile: Whatsapp +971504753686 / +919979971283**

**United Arab Emirates- Dubai**

**PROFESSIONAL EXPERIENCE**

### **SEGURO PVT WEALTH (U.A.E-Dubai) JUNE 2017 - TILL PRESENT**

### **WEALTH MANAGER**

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* Investment Advisory for Retail & HNI Clients.
* All types of Financial products like Mutual Funds, Structured Products, Hedge Funds, Bancassurance products and Bonds are dealt with.
* Financial Planning and Wealth Management of HNW Clients.
* Working on self-sourcing & referral model for the cross selling of Investment and Bancassurance Products.
* Track and translate investment performance and make recommendations
* Servicing of Existing Portfolio of the clients.

**SUSHIL FINANCIAL SERVICES PVT LTD (INDIA) NOVEMBER 2012 TO NOVEMBER 2016**

**RELATIONSHIP MANAGER**

* Managing the High Net Worth customers, Channel Partners & Sub brokers of the Company.
* Processing KYC’s of Individual/Corporate/Partnership Firm/HUF/NRI.
* Profiling Customers and providing financial products to meet customer needs.
* Ensuring the highest level of service to the High Net Worth customers, Channel Partners & Sub brokers.
* Providing Financial planning & Investment Advice.
* Achieving Business targets spread across all Wealth Products.
* Serving as One-point contact for all requirements of High Net Worth Customers Channel Partners & Sub brokers in the Company

**EDU WORLD (INDIA) JULY 2009 TO JULY 2010**

**TELE COUNSELLOR**

* Calling Students.
* Handling Queries.
* Back Office work & other activities.
* Assisting Senior Counsellor’s.

**EDUCATION**

**CHARTERED INSTITUTE OF SECURITIES AND INVESTMENTS (CISI-UK)**

INTRODUCTION TO INTERNATIONAL SECURITIES AND INVESTMENTS

**MASTERS-MASTER IN COMMERCE**

**GRADUATION-BACHELORS IN COMMERCE**

**HIGH SCHOOL- COMMERCE (INDIA)**

**CERTIFICATIONS**

Direct Life & General Insurance Broker.

Mutual Funds Module (National Stock Exchange of India)

CPFM Share Market from Davar’s Institute.

**EXPERTISE AND SKILLS**

* FIANANCIAL PLANNING
* WEALTH MANAGEMENT
* BANCASSURANCE ADVISORY
* PORTFOLIO MANAGEMENT
* CLIENT RELATIONSHIP BUILDING
* BUSINESS DEVELOPMENT
* CLIENT ACQUISITION AND RETENTION
* KYC KNOWLEDGE

**PROFILE SUMMARY**

Finance Professional with a proven record of Evaluating Business. An accomplished Wealth Advisor with thorough knowledge and experience in managing the wealth of High Net Worth clients. Extensive knowledge and expertise encompassing regulatory compliance, financial and risk management, and comprehensive financial planning. Sound Business Skills which converts superior results. A keen eagerness to become better with every passing day. Pursuing Chartered Wealth Manager LEVEL 3 from CISI (UK).