



Shruti Srivastava

Financial Planner and Wealth Manager with 6 years and 7 months experience with M/S Federal Bank limited. Consultant with a strong ability to identify initiatives and facilitate action driven plans to support individual financial growth and objectives. Financial professional with a proven record of evaluating investment opportunities, quickly understanding companies, individuals, their profession and their markets and making sound and profitable investment decisions.

Personal Information

DOB: 29th April,1990

Contact details :

+91-9995882923

Email:

shrutipaul2926@gmail.com

Personality Headlines :

Financial planner and advisor

Investment planner /advisor

Retirement planner

Estate advisor

Tax planner/advisor

Need analyst

Risk analyst

Strategic planner/analyst

Confident

Empathetic and Courteous

Independent

Active Listener

Professional Expertise:

- Good understanding or strong interest in financial markets and wealth management
- Good judgement and discretion working with highly confidential information
- Ability to contact and profile existing clients, leads and prospects
- Strong analytical skills with an emphasis on details
- Strong knowledge of banking and lending products including bank deposits, certificate of deposits, credit cards, mortgage products, lines of credits, security-based loans, High net worth tailored lending products and commercial credit products
- Possess excellent relationship building, business development and service skills and have the desire and drive to consistently achieve goals with top results

Employment History :

Federal Bank Limited

Manager- Wealth Management

October 2017- till date

Federal bank Limited

Assistant Manager- Branch Banking

July 2013 - September 2017

Education

Institute of Company Secretaries of India

CS- Executive

December 2016 to present

IIM Raipur

Executive program in Advance Corporate Finance and Risk Management

August 2019 to December 2019

Institute of Public Enterprise, Hyderabad

PGDM- Finance and Marketing

Year 2011-2013

Mohanlal Sukhadia University, Udaipur

BSc. – Biotechnology

Year 2007-2010

Certificates

American Academy of Financial Management – Certified Wealth Manager