

# Know Your Financial Advisor & Trainer

## ➤ Academic -

M.Com , Diploma in Taxation Practice, ICWA - Cost Accountant

## ➤ Professional Education -

- ❖ NSE - Market Professional
- ❖ NSE - Financial Goal Planner - Advance Level
- ❖ AMFI - Mutual Fund Distributor
- ❖ NISM - Certified Personal Financial Advisor
- ❖ Personal FN - India's 1st Certified Financial Guardian

## ➤ Experience -

- ❖ PATEL Financial Services - Rs 34 Crores - 135 Families
- ❖ LIC of India ( VRS - 31/12/2021 ) - Faculty Member - Trained more than 5000 LI & deliver lecture on Financial Planning to Dos of Gujarat & Maharashtra
- ❖ PATEL Global Finserv (OPC) Private Limited - 11-01-2022

