

Hetal A. Shah



Currently pursuing **Diploma in Financial Planning & Wealth Management (DFPWM)** leading to **CFP^{CM}**

<u>Qualification</u>	<u>Year</u>	<u>Name of College / School</u>	<u>Name of Univ. / Board</u>	<u>Percentage</u>
B.B.A.	2007	Som-Lalit Inst. Of Mgmt. Studies	Gujarat University	67.00%
H.S.C.	2003	Vidyanagar High school	Gujarat Board	71.00%
S.S.C.	2001	Vidyanagar High school	Gujarat Board	79.00%

PROFESSIONAL QUALIFICATIONS

Cleared the following NCFM modules

Capital Market (Dealers) (CMDM)	57.00%
AMFI-Mutual Funds (Advisors)	72.25%
Mutual Funds-Beginners'	91.00%
Commodities Market	52.00%
Derivatives Market(Dealers)	76.25%

Cleared the following CFP^{CM} module

Investment Planning	C Grade
Tax Planning and Estate Planning	C Grade

WORK EXPERIENCE

January 1, 2010 – February 28, 2010, **Internship Program with Fullerton securities & Wealth Advisory Company, Ahmedabad**

- Responsible for pitching different Mutual Fund products, Life Insurance, General Insurance, Portfolio Management services to Customers.

IT SKILLS Knowledge of MS-Excel, Power point, Word

HOBBIES/ INTERESTS Travelling, Music, Surfing Internet