

Ruchika 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.Com.	2005	S.J.M. College	Kuvempu University	76.00%
H.S.C.	2002	S.J.M. College	Kuvempu University	60.00%
S.S.C.	2000	St. Joseph's Convent School	Karnataka Board	64.00%

PROFESSIONAL QUALIFICATIONS

Cleared the following NCFM modules

Capital Market (Dealers) (CMDM)	57.00%
AMFI-Mutual Funds (Advisors)	62.50%
Mutual Funds-Beginners'	83.00%
Commodities Market	81.50%

Cleared the following CFP^{CM} module

Retirement Planning and Employee Benefits	B Grade
Tax Planning and Estate Planning	C Grade
Risk Analysis & Insurance Planning	C Grade

WORK EXPERIENCE

January 1, 2010 – February 28, 2010, **Internship Program with Prudent Corporate Advisory Services Ltd, Ahmedabad**

- Responsible for project on Investor's perception with respect to various asset classes.

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

HOBBIES/ INTERESTS Travelling, Dancing, Surfing Internet