

Vipul Jain



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>Board / University</u>	<u>Percentage / Grade</u>
PGDM	2000	MDU	Maharishi Dayanand Uni., Rohtak	65%
B.Com.	1998	MJCC	Bhavnagar University	58%
H.S.C.	1995	K.P.E.S, Bhavnagar	Gujarat Board	55%
S.S.C	1993	Aroma HSC, Ahmedabad	Gujarat Board	55%

PROFESSIONAL QUALIFICATIONS

Cleared the following NCFM modules

Capital Market (Dealers) (CMDM)	79.75%
AMFI-Mutual Funds (Advisors)	78.75%
Mutual Funds-Beginners'	86.00%
Derivatives Market (Dealers)	96.75%
Commodities Market	82.00%

Cleared the following CFP^{CM} modules

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

Work Experience

January 1, 2010 – February 28, 2010, **Internship Program with Prudent Corporate Advisory Services Ltd, Ahmedabad** - Project on Investor's perception with respect to various asset classes

<u>Year</u>	<u>Organization</u>	<u>Department</u>	<u>Profile</u>
Nov 08 to Aug 09	MD India Health Care Services (TPA), Mumbai	Business Dev.	Sales & Mktg.
Nov 07 to Nov 08	Batliwala & Karani Securities Pvt. Ltd, Mumbai	Wealth Mgmt.	Sales & Mktg.
Jan 06 to July 07	Thomas Cook India Ltd, Mumbai	Financial Services	Sales & Mktg.
May 04 to Jan 06	India Insure Risk Mgmt. Services, Mumbai	Insurance	CRM
April 01 to June 03	NuWave (e) Solutions Pvt. Ltd, New Delhi	Financial Services	Team Member

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

HOBBIES / INTERESTS Reading, Travelling, Movies