

# Sonam Rathi

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## **Profile Summary**

Experienced and academically astute finance professional with over 6+ years of exposure in mutual fund, shares, post office savings, IPO, NFO.

## **Work Experience**

### **RV Financial Solutions – Finance Manager – June 2019 till date**

- Working on different software – Visual Magic Pro-LIC, Wealth Magic Uploader, Magic SMS Professional.
- Maintaining Excel for monthly premium due of General Insurance and Life Insurance. Reconciling renewal premium receipt. Updating clients about the premium due.
- Managing entire transactions of Mutual Funds.
- Document preparation of clients for accounting year 2018-2019 and coordinating with CA.
- Maintaining cheque/cash entry, voucher verification, bank transactions, inward-outward record of all the documents.
- Organizing file systematically – alphabetically and serially and dividing each file into mutual fund, LIC, general insurance, life insurance and others.
- Preparing ready reckoner of all clients.
- Petty cash management.
- Staff management – attendance, salary, assigning day to day work.

### **Divine Energy System LLP – Finance Manager – November 2009 till June 2016**

- Analyzing client's risk profile, advising mutual fund investment avenues in equity n debt.
- Timely guidance to clients on purchase, redeem and switch funds among different asset classes for portfolio diversification reviewing risk-reward analysis.
- Customer service – generation of account statement, update client profile in accordance with changing SEBI rules and regulations.
- Research on scripts on which funds are invested and new upcoming investment opportunities in shares, mutual funds, insurance etc.
- Team management and accountability on delegating tasks to the staff.
- Making detail statement of shares, mutual fund, dividend, capital gains of the company.
- Maintaining books of accounts of the company and its directors.
- Track investment on daily basis and managed portfolio of company and its directors.
- Design and prepare weekly financial newsletter for internal circulation.
- Managing cash at bank and park it in Liquid Funds.
- Reconciling bank statement with books of accounts, supporting with vouchers and memos.
- Online share trading for short term and long-term period.
- Headed a team of 4 people, train them with investment fundamentals and intricacies.
- Conducting training programs and educating clients on changing market scenarios, new funds, macro and micro factors making investment environment dynamic and relevant investment strategies accordingly preparing and sharing power-point presentation and encouraging discussions.

- AMFI (Association of Mutual Funds in India) certified. It's a SEBI compliance for distribution and advisory of mutual funds. Registered with 15+ Asset Management Companies.
- Acquiring new clients and maintaining existing client through various advertisements and promotions.
- Attended various skill development and career advancement training sessions.

#### **Fact International LLP – Executive – March 2004 till June 2007 - India**

- Tele-calling to existing clients for their feedback on the product usage and issues related to it.
- Lead generation and tele-calling to prospective clients and planning for product demo.
- Organizing training sessions for existing clients on new versions of the product & query resolution.
- Assisted HR during formulation of multiple-choice questions, interview sessions of new candidates.

#### **Key Skills**

- Ability to work under adverse situations and time constraints with diverse groups.
- Strong interpersonal, communication and analytical skills.
- Self-motivated and a learner.
- Possess leadership qualities and an efficient team member with flexible work approach.
- Ability to prioritize task and work on multiple assignments.
- Proficient in Visual Magic Pro, Wealth Magic Uploader, MS-office – word, excel, power point.

**Summer Internship** while pursuing MBA.2 months training at Reliance Mutual Fund, Kolkata, May 1<sup>st</sup>, 2008 till June 30<sup>th</sup>, 2008 on a project titled:

#### **Importance of Information Technology in Marketing of Financial Product.**

- Received training in KBolt, KarvyMFS.
- Market research to understand the investor behavior, risk profile and comparative study on other popular mutual fund brands.
- Prepared questionnaire for client survey on Performance of Reliance Mutual Fund.
- Practical training on managing customer service, sales pitch to clients.
- Attended training programs on equity, debt, portfolio management, market updates, different funds of Reliance mutual fund.
- Became aware of investors issues related to financial transactions and backend operations.

#### **Dissertation** while pursuing MBA **Equity Research on FMCG Sector – Dabur Ltd.**

- Prepared exhaustive equity research report on FMCG sector in general and Dabur Ltd in particular with detailed analysis and research work on the financials.
- Analyzed financial, industry specific, business and current markets related information using internal and external sources.
- Prepared SWOT analysis of FMCG sector.
- Conducted in-depth fundamental and technical analysis of the company using various equity ratios, correlation, regression, charts, financial model.

#### **Share Trading Training** – Ashika Share Trading Pvt. Ltd.

- Undergone training of live share trading in NSE & BSE.
- Understanding intricacies about the ODIN software
- Prepared project report on Fundamental Analysis of Shares: ITC

## **Academic Credentials**

<b>Degree/Diploma</b>	<b>Institution</b>	<b>University/Board</b>	<b>Year of passing</b>	<b>Percentage/ CGPA</b>
MBA-Finance (Major) Marketing (Minor)	Amity Business School	Amity University	2009	7.20
B.COM-Accounts	Shri Shiksha Yatan College	Calcutta University	2006	63%
XII	Shri Shiksha Yatan School	West Bengal Board	2003	70%
X	Shree Jain Vidyalaya	West Bengal Board	2001	73%

## **Extra-Curricular Activities/Achievements**

- Organizing chess tournaments with various clubs, Kolkata.
- Learned practical implications of Astrology (horoscope) and Vastu (similar to Fengshui).
- Certified practitioner of Silva Mind Control, Art of Living.
- Educating underprivileged kids for an NGO, Kolkata.
- Core committee member of Finance Club, Amity University.
- Topper in Information Technology and Income Tax in college exams.
- Proactively participating in CSR activities of Divine Energy System LLP.
- Anchoring and MC (Master of Ceremonies) various social events.
- Class Representative while pursuing MBA- 2 years, college – 3 years.
- Written and published Yoga Articles in magazines on various health issue.
- Awarded National Gold Certificate for consecutive 2 years for 108 Sun Salutation (Surya Namaskar) in 45 minutes with different rhythms of slow, medium and fast.

**Place: Indore, Madhya Pradesh**

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