

Lata Komati

Wealth Advisory & Client Relationship Specialist




✉ latakomati1204@gmail.com ☎ +91 9821841861 📍 Kondapur, Hyderabad

🌐 [linkedin.com/in/lata-komati-21a161190](https://www.linkedin.com/in/lata-komati-21a161190)

👤 PROFILE

Experienced and client-focused wealth advisor with a strong background in delivering personalized financial solutions and developing holistic strategies for client portfolio management. Skilled in portfolio analysis, risk assessment, and investment planning, with a deep understanding of market trends and economic indicators. A results-driven and innovative professional with a proven track record of enhancing client satisfaction and achieving financial growth objectives.

📁 PROFESSIONAL EXPERIENCE

08/2021 – 11/2024 Mumbai, India	Equentis Wealth Advisory Services – Research & Ranking  Manager – Retention and Operations <ul style="list-style-type: none">Managed client portfolios and ensured growth through strategic investment planning and wealth advisory solutions.Fostered long-term client relationships by providing personalized financial advice and regular updates.Upsold tailored investment solutions based on market trends and stock analysis, contributing to revenue generation.Drove client retention by aligning company product offerings with individual financial goals.
10/2019 – 04/2020 Mumbai, India	FCM Travel India  Senior Executive <ul style="list-style-type: none">Engaging in collaborative sessions with the Sales team to strengthen alignment with our corporate clients.Strategically designed and recommended personalized travel itineraries by monitoring global travel trends, destination highlights, and visa regulations.Built and maintained strong partnerships with Destination Management Companies (DMCs) and hotel partners to ensure seamless travel experiences.
08/2016 – 10/2019 Mumbai, India	Cox and Kings India  Executive <ul style="list-style-type: none">Facilitating the seamless transmission of corporate inquiries from Sales team to DMCs secure superior products and competitive rates, along with estimated budgets.

🎓 EDUCATION

2023 – present Mumbai, India	Master's in Applied Finance Narsee Monjee Institute of Management Studies
2013 – 2016 Mumbai, India	Bachelor of Commerce Bhavans College

🏆 CERTIFICATES

2020 – 2021	Certified Investment Banking Operations Procedure Imarticus Institute, Mumbai
2016	Diploma in Aviation & Tourism Management IITC – Authorized IATA Training Center, Bandra (W)