

RESUME



UMESH SHARMA

Financial Advisor

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Address

Navrang Puri Pilkhuwa Hapur

Mob no

9627834452

Email

sumesh733@gmail.com

Father's Name

Devendra Sharma

Date of Birth

09/09/1989

Marital Status

Married

Career objective

To obtain the challenging career in the Financial market and put all my efforts in to the growth of organization and have a great working environment.

Academic Qualification

- **Intermediate** From **U.P Board** with 59.9 % marks.
- **High School** From **U.P Board** with 55% marks.

Technical Qualification

- Completed **B.Tech in Mechanical Engineering** from SHANTI INSTITUTE Of ENGINEERING COLLEGE , Meerut (affiliated to **UTTAR PRADESH TECHNICAL UNIVERSITY,LUCKNOW**)

Experience

- **Presently Working** with **Anand Rathi Pvt Ltd** as senior Executive from 16 June 2025 to till now.
- Past time working with **Elite Wealth Ltd** as Senior Equity advisor 18 july 2016 to 5 march 2025.

Job Description

- Responsible to fulfill the financial needs of client
- Acquisitions of new client for multiple financial product which include Portfolio management, Mutual Funds, Share Market, Financial Planning NPS etc.
- Making Sound marketing strategies for client acquisition And retention.
- Ensure client satisfaction by building good relationship With client.
- Active participation in business planning with your team

Hobbies & Strength

Playing Cricket
Self Determent & Good
Communication

Member.

- Keeping record of clientele.

Technical skills

- Passed NISM test **Equity & Derivative.**
- Windows-XP, 7 & 8, Internet & Microsoft Office.

Declaration

I confirm that to the best of my knowledge and beliefs this Resume correctly describe me and my qualification and experiences.

Place -Hapur

Date -
(Umesh Sharma)