

EDUCATION

NORTHEASTERN UNIVERSITY, Boston, MA

D'Amore-McKim School of Business

Master of Science in Quantitative Finance, Cumulative GPA: 3.9/4.0

Awarded D'Amore McKim School of Business Achiever's Scholarship

September 2022 - August 2023

STELLA MARIS COLLEGE, Chennai, India

Bachelor of Commerce, Corporate Secretaryship (First class distinction)

June 2012 - May 2015

PROFESSIONAL EXPERIENCE

WEBSTER BANK, Cheshire, CT

September 2023 - Present

Delivering licensed financial advisory and client-focused wealth management solutions

Financial Consultant – Client Advisory

- Managing \$44 million in client assets, developing tailored financial plans aligned with client goals
- Building long-term client trust through proactive portfolio reviews and personalized recommendations

NORTHEASTERN UNIVERSITY, Boston, MA

January 2023 - Present

Graduate Assistant

- Assisted the admissions team with the evaluation of student applications
- Provided program-related guidance and support to incoming students

NORTHEASTERN UNIVERSITY, Boston, MA

September 2022 - August 2023

Analyst – 360 Huntington Mutual Fund

- Performing quantitative research using distinct valuation models
- Writing research reports and providing portfolio rebalancing recommendations

INTERNATIONAL MONEY MATTERS, Chennai, India

November 2018 - August 2022

Trusted partners providing financial planning & wealth management services

Financial Analyst – Wealth Management

- Delivered tailored investment advice to 30+ clients, advising on a total of \$1.35 million in assets
- Recommended strategies for cash management, budget preparation and insurance coverage

FINSCHOLARZ WEALTH MANAGERS LLP, Chennai, India

November 2017 - October 2018

Boutique firm providing financial planning and portfolio management services

Associate – Investment Services

- Analyzed client data collection sheets, prepared income tax returns, and researched asset allocation and mutual fund selection
- Conducted personal finance workshops for 700+ women through outreach efforts.

KPMG INDIA PRIVATE LIMITED, Chennai, India

May 2015 - August 2017

Analyst – Mergers & Acquisitions

- Analyzed financial statements and reported findings on employee attrition and related costs
- Summarized Master Service Agreements and earned the KPMG Encore award in 2017

NAVIA MARKETS LIMITED, Chennai, India

November 2014 - February 2015

Financial services firm providing brokerage services for stocks, currencies, and commodities

Research Intern – Priority Relations

- Assisted in monitoring portfolios of high net-worth individuals and helped with new client enrollments
- Handled customer service feedback calls and increased customer satisfaction by resolving queries

CERTIFICATIONS

- Financial Planner Certification, Financial Planning Standards Board
- SIE, Series 7, Series 66
- CT Life & Health Insurance
- Mutual Fund Distributors Certification, National Institute of Securities Market

COMMUNITY INVOLVEMENT

- IRS Volunteer Income Tax Assistance and Tax Counselling for Elders
- Financial Services Center, Massachusetts Institute of Technology
- Youth Red Cross Club at Stella Maris College