

## EDUCATION

**NORTHEASTERN UNIVERSITY**, Boston, MA

September 2022 - August 2023

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*

**STELLA MARIS COLLEGE**, Chennai, India

June 2012 - May 2015

*Bachelor of Commerce, Corporate Secretaryship (First class distinction)*

## 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