

# Jostin Jacob

## Senior Manager

A ingenious problem solver widely passionate about spreading financial literacy, Investor education, entrepreneurship and nurturing talent.



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Vazhakulam PO, Cochin, India 📍

## WORK EXPERIENCE

### Senior Manager

#### Hedge Wealth Management Services (Hedge Equities Ltd)

11/2016 – Present Cochin  
A full service Wealth Management, Financial & Investment Advisory services firm

##### Achievements/Tasks

- Advise clients on Investments & financial planning providing need based solutions aligned with client risk-reward profile and investment goals. Directly managing 142 client accounts with a total AUM of over Rs. 85 Crores.
- Meet and engage with clients to perform annual or need based reviews to assess financial health, ensure suitability of existing plans, and propose value-added solutions to client's needs.
- Actively observed market fluctuation and economic trends and advised clients on changes of legislation, tax ramifications, and economic outlook that might affect their financial well-being.
- Strong people management skills. Effectively coached new hires in the team on principles of Client Relationship Management, Wealth Management, Investment Advisory, and basics of Tax planning.
- Presented products notes and investment recommendations to investors on Mutual funds by analyzing fund parameters.

Contact: Suraj Ramachandran - Chief Financial Officer(CFP)

### Financial Consultant

#### Geojit Financial Services Ltd

02/2015 – 04/2016 Cochin  
A leading Investment Services Company, offers wide portfolio of savings and Investment solutions

##### Achievements/Tasks

- Assesses clients financial situation by gathering information regarding investments, asset allocation, savings, tax planning, retirement planning and estate planning.
- Develops financial strategies by guiding clients to establish financial goals, matching goals to situation.
- Monitors clients financial situation by tracking changes in wealth and life circumstances; analyzing financial plan results; identifying and evaluating new financial strategies.

Contact: Fancy Joseph - Branch Manager

## EDUCATION

### Investment Advisor Level 1 & Level 2 National Institute of Securities Market

### Chartered Wealth Manager Level - 1 American Institute of Financial Management(AAFM India)

### Master of Business Administration DC School of Management and Technology

2012 – 2014 Thodupuizha

##### Courses

- Finance
- Marketing

### Bachelor of Business Administration Mar Augusthinose College

2009 – 2012 Ramapuram

## SKILLS

Financial Planning

Portfolio Management

Skill

Relationship Management

Creativity

Problem Solving

Project Management

Microsoft Office Applications

Verbal & Written Communication

## ACHIEVEMENTS

Lead a team and was awarded winner of the campaign held within the company (2018)

Winner of Duffmuttu Competition (2008)

- State Youth Festival

## LANGUAGES

English



Malayalam



Hindi



Tamil



## INTERESTS

Financial Literacy

Entrepreneurship

Mentoring

Dance

Music