



Vikrant Rathod

vikrant@swsfspl.com ✉

+91-7507884477 📞

Nashik, India 📍

PROFESSIONAL PROFILE

Financial services professional with **11 years of experience** in wealth management, mutual funds, insurance and client relationship management.

Since joining SWS in November 2015, he has been dedicated to helping individuals and families make informed financial decisions and work towards long-term financial security. He believes financial advisory goes beyond investment recommendations: it involves understanding clients' goals, managing risks, creating financial awareness and building lasting relationships based on trust and transparency.

WORK EXPERIENCE

○ Senior Business Development Manager

SWS Fintech Services Pvt. Ltd.

11/2015 - Present

Nashik

Helping individuals and families make informed financial decisions through mutual fund investments, goal-based planning, insurance protection and long-term wealth creation.

EDUCATION

○ Master's Degree in Commerce

○ Bachelor's Degree in Commerce

○ CA Intermediate

Institute of Chartered Accountants of India

○ CS Intermediate

Institute of Company Secretaries of India

AREAS OF EXPERTISE

Mutual Fund Investments & Portfolio Allocation

Financial Planning & Goal-Based Investing

Insurance & Risk Management

Client Relationship Management

Financial Awareness & Investor Education

PROFESSIONAL CERTIFICATIONS

- NISM Series V-A – Mutual Fund Distributors
- NISM Series XV – Research Analyst
- NISM Series XXV-B – Investment Advice (Sales and Other Non-Core Services)
- PGP Goal Planner

PROFESSIONAL PHILOSOPHY

"Process is more important than the result."

Strongly believes in ethical practices, transparency and a client-first approach, empowering clients through financial awareness and disciplined financial decisions on their path to financial independence.

AREAS OF INTEREST

Painting.

Cooking.

Playing Cricket.