



Kishor Baban Kale

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Mumbai, India 📍

WORK EXPERIENCE

Mumbai Branch Head

SWS Financial Solutions Pvt Ltd

2017 - Present

Mumbai, Maharashtra

SWS Financial Solutions Pvt Ltd is a business unit which provides all kinds of Financial Services and Financial Advisory under one roof. We merged our individual business with SWS in the Dec, 2017 for providing all the Financial Services to our clients. SWS is currently managing 400 Crores of Assets Under Management with more than 4000 clients. It is a First SEBI Registered Investment Advisor in Nashik. Accomplished Geographical expansion in cities like Pune, Nagpur, Mumbai, Wardha and Thane based on a unique business model. Developed Home Loan DSA team. Formulated Financial Literacy Club in 9 management institutes in Nashik, Nagpur, Pune and Wardha for students and teachers.

Speaker

Conducted more than 50 Financial Planning seminars

Expert Appearance on a News Channel

Participated as an Expert Financial Adviser in a program on DD News Channel called "Paisa Vasool" in more than 30 episodes.

Wrote Articles for the News Papers

Written articles for DNA and Marathi News Papers

Founder

Wealthomax Financial Advisers LLP.

2005 - 2007

Started a Financial Product distribution business and provided unbiased advice to Mumbai based clients, and then started Geographical expansion in cities like Nagpur, Amravati and nearby suburbs of Mumbai, like Thane, Dombivali, & New Mumbai.

Professor

IDEAL coaching classes

1997 - 2015

Started delivering lectures to the commerce students on the various subjects like accounts, business management, taxation, and corporate laws.

Accountant and Tax Consultant

Manages various accounts and taxation matters for Partnership Concerns, Private Ltd, & Public Ltd Companies.

1995 - 2000

Article Assistant

Completed Articleship with Dhere & Yeolekar Chartered Accountant, Mumbai

1995 - 1998

AREAS OF INTEREST

Running Marathons

Listening to Music

Reading Books

Public Speaking

Team Building

Customer Relationship Management

Portfolio Management

Team Training

Financial Planning

Teaching

EDUCATION

Certified Financial Planner

Financial Planning Standard Board Ltd

2008

Inter CA

Institute of Chartered Accountants of India

1997

Registered Investment Advisor

Level 1 SEBI

AMFI Certifications

SEBI

B.com

University of Mumbai

1995

LANGUAGES

English, Hindi, Marathi and Gujarati

Full Professional Proficiency