

# CURRICULUM VITAE

**Dr. Ramesh Chand Maloo**

**Ph. d & CFP (CM) Certified Financial Planner**

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## **Work Experience:**

- **20 years experience in financial market as Director of Maloo Finance Investment Services**

## **Profile**

- Dealing in Rajasthan for Financial Planning Since 1993
- Establishment of branches in Rajasthan and to increase the coverage in entire Rajasthan
- To increase customer base with higher satisfaction by advise on achievement of financial goals
- Smooth function of administration and processing of all transactions
- Maintain business relationships with clients in the region
  
- Taking care of institutional sales, Mobilizing funds from corporates across Rajasthan
- Handling Banking transactions to mobilize collections from companies and HNI clients
- Building relationship with large, medium and small companies in entire region.
- Handling PMS- institutional products
- Co-ordination with the Senior Officers of Mutual Fund companies at their HO level
- Imparting training of various financial product to staff

## **Nature of Financial Solutions Business :**

Objective to cater the need of managing funds of corporate/ individual through various market/ non market linked schemes.

- Need for Pension & retrials
- Providing customized solutions to the investors to meet their liabilities in various stages of life
- Robust networking with Finance and Investment professionals in the industry and direct selling of financial Solutions products like Mutual funds, Fixed interest Saving schemes etc. to clients through personal visit and conducting seminars for them on various emerging trends, challenges and tax related issues.
- To Educate clients about the concept and benefits of the pension plans based on market linked platform and Provide proactive advice on asset allocation of debt and equity in their portfolio.
- Relationship management at top management levels with key clients and develop engagement points with them for regular interaction
- Provide financial, legal and taxation advice to the client in trust formation and fund migration
- Tie up with National and regional brokers for the promotion of financial products
- Conducting training sessions for managers/ staff for feeding them with the vital information of various schemes to enhance the capabilities of understanding the difference between right and wrong financial decisions
- Worked on a database of BSE 100/CNX Nifty 500 corporates for better understanding on PE/PB and EPS

### **Achievement :**

- Achieved the milestone of fund mobilization of over Rs 100 Cr from Rajasthan
- Extensive coverage of the market and intensive mapping of all major investors in region
- Developed strong links with Mutual funds and Insurance Cos. at senior level to leverage their relationships for better client services
- Trained over 2000 investors with help of various workshops and seminars like (Tan/Man/Dhan)
- Business Development and exploring new markets for expansion of Maloo Finance through Marketing in Rajasthan state.
- The responsibility includes building network of trained staff – Recruitment, training and motivating a dedicated team who can contribute to business growth and customer satisfaction
- To educate the investors about the concept of mutual Fund and benefit under the schemes floated.
- To manage relationships with clients, Day to day contact with investors by conducting meetings and understanding their needs and providing feedback.
- Manage relationship with corporate clients and High Net Worth investors, trusts, banks, Co-operative societies and educational institutes through presentation and meeting.

### **Achievement :**

- Establishment of Jaipur branch
- Mobilized Rs 500 crores gross collections, Net AUM of 140 Cr
- Ranked No-1 financial Planner on state level
- Handling over and above 2500 investors of Rajasthan and conducted training sessions for them at various places in Rajasthan.
- Handled branch accounts and administration
- Maintained highest servicing standards and reduced number of complaints
- Actively participated in trade fairs and organized road shows
- Increased customer base both retail and corporate investors
- Successfully maintained highest fund retention ratio at Jaipur
- Marketing of Financial Products of RBI, LIC, Mutual Funds, FDs, Bonds, UTI Schemes, IPOs, Post Office Schemes, and Insurance etc.
- Providing consultancy for Tax Planning, Retirement Investment Planning, Short Term Cash Flow Planning, and Insurance Planning.
- Providing customized Investment Planning and Portfolio Management of investments.

### ***Products Handled***

- Mutual Funds, Initial Public Offers
- Fixed deposits
- Tax free Bonds
- Private Placement of Long & Short term Debt Products
- Online products – Mobile Invest, Online Subscriptions

### **Professional Qualification**

- Three year full time Ph.D (2009 - 2012) from *University of Rajasthan*
- Two year full time CFP course for Certified Financial Planner
- Other: 1. Qualified AMFI exam for Mutual funds

## 2. Qualified IRDA exam for Life Insurance

### **Educational Qualification**

- Post Graduation in M.Com A.B.S.T. in year 1992, from University of Rajasthan , Jaipur
- B. Com from University of Rajasthan , Jaipur in year 1989 secure **27** rank at university level.
- Secondary and Sr. Secondary from Rajasthan Board, Ajmer

### **Trainings**

Pursued training arranged by various financial companies on

- **Professional Selling Skills**
- **Winning Account Strategies**

Training by Bombay Stock Exchange Ltd. Training Institute on

- **Basic Programme on Derivatives**

### **Personal Profile:**

Date of Birth: 15th June, 1969

Marital Status Married

Address: 50, Bhirghu Nagar,  
Behind Gehlot Ka Bangla,  
Ajmer Road, Jaipur – 302021

Place : Jaipur

Date :

***Ramesh Chand Maloo (Dr.)***