



ANNA CATHERINE M

Certified Financial Planner

Contact

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LinkedIn

www.linkedin.com/in/anna-catherine-m-2305

Hobbies

- ✓ Reading books
- ✓ Investing
- ✓ Playing piano

Skills

- Tally ERP 9
- MS Office Suite
- Web Designing
- Leadership Skills
- Analytical thinking
- Team player

Career Objective

Driven Certified Financial Planner with a passion in financial planning and looking forward for providing clients with optimal assistance in Retirement planning, Estate planning, Investment advice, Insurance and risk analysis, Tax strategies and an overall support for managing their finances.

Experience

Financial Planner (April 2021- Present)

Armstrong Capital and Financial Services Pvt Ltd, Bangalore

Education

BACHELOR OF COMMERCE- BANKING & INSURANCE

Sahrdaya College of Advanced Studies, Calicut University

2017 - 2020

HIGHER SECONDARY EDUCATION

Kanikkamatha English Medium Girls Higher Secondary School,

Grade 87%

06/2015 to 03/2017

SENIOR SECONDARY CERTIFICATE

St. Ann's Public School, Palakkad, Kerala , C.B.S.E

Grade 8.2

06/2009 to 03/2015

Professional Certificates

CERTIFIED FINANCIAL PLANNER CM (CFP)

Financial Planning Standards Board , India (2020–2021)

PROGRAM ON INVESTMENT ANALYSIS & VALUATION

NSE Academy

PERSONAL AND FAMILY FINANCIAL PLANNING

University Of Florida - Coursera

Academic Projects

The Perception of Customer's Investing in Life insurance

Description: To analyze and determine the perception and to identify the factors underlying, that influence the customers investing in life insurance.