

# AKHIL AKOLE

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## PROFESSIONAL SUMMARY

I am a PGDM (Finance & Operations) student with hands-on experience in financial planning and mutual fund advisory. During my internship at Bajaj Capital, I converted prospects into investors by delivering personalized investment solutions. Skilled in data analysis and Excel, I combine analytical thinking with strong communication skills to build a career in finance.

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## WORK EXPERIENCE

Bajaj Capital, Gurgaon

### Intern | 04/2025 – 06/2025

- Engaged 46 prospective clients, converting 9 into active investors and consistently exceeding sales targets through tailored financial solutions.
- Applied financial planning principles to develop personalized investment profiles based on clients' income, expenses, risk tolerance, and goals.
- Recommended appropriate investment options including mutual funds, insurance, and tax-saving instruments to support long-term wealth creation.
- Enhanced communication and consultative selling skills via regular client interactions, objection handling, and customized financial advice.
- Completed comprehensive training on financial products, goal-based planning, and SEBI-compliant advisory standards.
- Utilized Excel & PowerPoint for financial analysis, data tracking, and client reporting.
- Received a formal Letter of Recommendation addressed by the AVP of the company in recognition of strong performance, professionalism, and client engagement during the internship.

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## NOTABLE ACHIEVEMENTS

- Part of organizing the college fest with a footfall of more than 800 people with **team of 10** handled the administration department.
- Managed various sports event of **200+ participants**.

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## EDUCATION

Fostiima Business School | 2026

**PGDM - Finance & Operations**

Ness Wadia College of Commerce | 2020

**12th - 79.69%**

Ness Wadia College of Commerce | 2023

**Bachelor of Commerce - 8.89 CGPA**

Takshila School | 2018

**10th - 85.2%**

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## CERTIFICATIONS & SKILLS

- Certifications- TCS iON Career Edge - Young Professional by TCS, CAA (Certificate in Advance Accounting).
- Technical skills- Data Analysis, Ms. Excel, Data Visualization & Interpretation, Mutual fund advisory, SIP planning.
- Soft Skills- Communication, Task Management, Leadership, Teamwork.