



Placements SRHU &lt;placements@srhu.edu.in&gt;

## Proposal to Hire Freshers 2023 - 2024 Batch - Wise Finserv Pvt Ltd.

6 messages

Utprerika Srivastava &lt;utprerikasrivastava@wisefinserv.com&gt;

Thu, Dec 7, 2023 at 11:35 AM

To: placements@srhu.edu.in

Cc: dalbirsingh@srhu.edu.in, shalvichawla@wisefinserv.com

Hi Team,

We are looking forward to visiting your esteemed institution (Virtually) for Campus Hiring and would like to share a brief description regarding our culture , job description , rough idea of the compensation package offered by us and the procedure for Hiring .

### About Wise FinServ Pvt Ltd

The birth of Wise FinServ evoked when many corporates started having a product centric approach to meet organisational goals rather than having a client centric approach to meet client financial goals. The journey of financial planning & investment advisory services at Wise FinServ started when two like-minded, senior, qualified, experienced wealth manager Ajay Kumar Yadav & Charu Pahuja thought to render Financial Planning Services across the country by leveraging technology platform & setting up high standards of practicing financial planning. The objective was not only to grow the balance sheet of company but also to spread right financial planning among people as social responsibility.

**Wise FinServ** is a Financial Planning , Investment Advisory and a Wealth Management company headquartered at Noida and managing client's portfolio across globe by leveraging technology . WFS group is in India since last 12 years growing by leaps& bound . We have branches in multiple locations like Mumbai, Delhi, Noida, Lucknow, Varanasi, Kolkata & soon will have branch in Bangalore & Chennai too.

We have even witnessed great success with our online platform **Wise Funds** which is an entirely digitalized initiative of Wise Finserv and assists our customers to buy most financial products available to retail & HNI clients . Products like Mutual Funds , Bonds, MLD, Corporate fixed deposit , Equity PMS, Life Insurance & Health Insurance help our customers to build , grow and protect their wealth . The main theme behind this platform for us is to connect & empower the Indians about the importance of Financial Freedom and Financial Planning.

Wise FinServ has 3 different Strategic Business Units – Family Office, Private Wealth Management, and Retail Financial Planning Unit. Wise Finserv group has 4 group companies , Wise Finserv Insurance , Wise Investments , Wise Funds & Wise Bonds.

We work towards assisting our clients in planning and executing their future financial goals . Our dedication in serving our customers has been paramount and hence we have been on a mission to spread financial literacy in India .

For more details, please find attached our company profile. You can visit our website [www.wisefinserv.com](http://www.wisefinserv.com) , [www.wisefunds.in](http://www.wisefunds.in) , [www.wisebonds.in](http://www.wisebonds.in) for deeper insight.

### Job Description of Management Trainee – Private Wealth Solutions

- To do new client acquisition and to generate fee income by creating financial plans & portfolio management post understanding of risk profile & goals of customers.
- Analysing information and preparing best asset allocation suited to individual clients' requirements.
- To review client portfolio in terms of IRR , asset allocation mix , tax efficient returns, & IRR of portfolio vs Sensex/NIFTY/ Blended benchmark
- Ensures high levels of customer service orientation and application of Company policy.

- Monitoring & reviewing plans with clients with news of new financial products or changes to legislation that may affect their savings and investments;
- Deepen the relationship by Cross selling Mutual Fund, FD, Bonds, and other financial Products and Services according to customer needs.
- Strong analytical ability, comprehensive fiscal knowledge and customer service skills to help the clients assess their financial assets, determine their financial goals, and weigh their economic resources to take investment decisions.
- Should help clients to assess how aggressive they can be with their investments and the amount of risk they can bear considering the client's long- and short-term goals, family status, age, employment and expenses.
- Conducting in-depth reviews of clients' financial circumstances, current provision and future aims.

### Wise FinServ benefits

1. Industry-acclaimed Induction Training
2. Regular seminars on New Products and best Financial Planning practices
3. Regular Interaction with Mutual Fund Managers & Portfolio Managers
4. Live case study on- Retirement planning, Child education planning, Marriage planning, Wealth management.
5. Opportunity to attend training sessions by IIMs & other top Management Institutes of India

### Key Qualification Requirements

- Graduation is a must (PGDM (Finance) / MBA (Finance)). (we are entertaining final year appearing candidate)
- Strong Communication & Public Speaking Skills .
- Proficiency in MS Office & Tools ( MS Office , MS Excel , MS PowerPoint ) .
- MBA/PGDM in Finance or Marketing is a plus.
- Professional Qualifications (CA/CFA/CPA/CMA) are an added advantage
- Completion of NISM Modules are value adds.

### Selection Procedure

1. Shortlisting Resume
2. Aptitude Test
3. Group Discussion & Personal Interview
4. Interview with Senior Management

### Compensation

**At Wise FinServ, we practice & promote culture of rewarding people for their hard work & achievement on regular basis.** We feel that rewards are necessary to encourage & motivate people to do good work. When hard work is appropriately rewarded and duly recognized by the management, **employees feel valued by the organization for what they put in.**

**Fixed in-hand CTC : 4.0 LPA**

**Annual CTC : 6.0 LPA**

1. **Fixed in-hand Compensation Package 3,00,000 LPA**
2. **Fixed Accrue Bonus 94200 yearly which will be paid on completion of two years with organisation from the date of joining** (Confirmed in the offer letter itself)
3. Yearly Bonus & Incentives upto 200000 will paid basis of overall performance .
4. **Job Location Noida / Lucknow/ Mumbai / Kolkata/ Varanasi**

We are looking forward to visit your campus placement and select the best candidates that suit the role and our company's vision.

Thanks & Regards



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**Utprerika Srivastava**

HR &amp; Operations Executive

Investments Product &amp; Services

Mob: 6307183014

Email : [utprerikasrivastava@wisefinserv.com](mailto:utprerikasrivastava@wisefinserv.com)Website: [www.wisefinserv.com](http://www.wisefinserv.com)Follow us on     [Wise FinServ](#)[Wise Funds](#)[Wise FinServ Insurance](#)[WiseBonds.in](#)

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**About WFS Group Companies.pdf**  
1225K

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**Placements SRHU** <[placements@srhu.edu.in](mailto:placements@srhu.edu.in)>  
To: Utprerika Srivastava <[utprerikasrivastava@wisefinserv.com](mailto:utprerikasrivastava@wisefinserv.com)>

Thu, Dec 7, 2023 at 12:13 PM

Dear Ma'am,

Please accept my sincere thanks for your kind response and the details.

I will revert back to you with the details of the interested students at the earliest.

With warm regards,

[Quoted text hidden]

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**Dalbir Singh**  
**Head Placements**  
**Swami Rama Himalayan University(SRHU)**  
**Dehradun**  
**Contact :9784628844**

**Utprerika Srivastava** <utprerikasrivastava@wisefinserv.com>  
To: Placements SRHU <placements@srhu.edu.in>

Thu, Dec 7, 2023 at 12:42 PM

Acknowledged

Thanks & Regards

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**Utprerika Srivastava**

HR & Operations Executive

Investments Product & Services

Mob: 6307183014

Email : [utprerikasrivastava@wisefinserv.com](mailto:utprerikasrivastava@wisefinserv.com)

Website: [www.wisefinserv.com](http://www.wisefinserv.com)

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Placements SRHU <placements@srhu.edu.in>  
To: Utprerika Srivastava <utprerikasrivastava@wisefinserv.com>

Mon, Dec 11, 2023 at 10:58 AM

Dear Ma'am,

With reference to the trail mail, please find attached the CVs of the students who have shown keen interest to participate in the recruitment drive of your esteemed organization.

Please guide us for the further process to be followed.

Looking forward to your kind guidance.

With warm regards,

On Thu, Dec 8, 2023 at 11:36 AM Utprerika Srivastava <utprerikasrivastava@wisefinserv.com> wrote:

[Quoted text hidden]

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## 15 attachments

MAHZABEEN HASSAN
















20221202\_192722\_0000 (1).png  
169K

ABHINAV RAWAT



IMG-20221124-WA0009 (3).jpg  
58K



-  **VanshikaResume (1) (2).docx**  
33K
-  **AKSHAY resume cv.docx**  
46K
-  **rakhi resume-1.pdf**  
124K
-  **CV AKSHITA NAWANI (1).doc.pdf**  
253K
-  **CV ARTI PUNDIR (1).pdf**  
177K
-  **sumit Bhatt cv (5).pdf**  
83K
-  **MONIKA CV (2).pdf**  
108K
-  **CV Ayush Bhatt.pdf**  
43K
-  **ShivamChauhanResume. (1).pdf**  
119K
-  **Resume**  
1692K
-  **CV file of Ansh Verma.pdf**  
538K
-  **resummm1111 (1).pdf**  
68K
-  **CV (7).pdf**  
235K

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**Placements SRHU** <placementsbirsingh@srhu.edu.in>  
To: Utprerika Srivastava <utprerikasrivastava@wisefinserv.com>

Wed, Dec 13, 2023 at 4:14 PM

Dear Ma'am,

We are keenly looking forward to your kind response.

This is to kindly inform you that the students have examinations from December 21,2023,so request you to kindly plan accordingly.

Looking forward to your kind guidance,  
[Quoted text hidden]

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**Utprerika Srivastava** <utprerikasrivastava@wisefinserv.com>  
To: Placements SRHU <placements@srhu.edu.in>  
Cc: shalvichawla@wisefinserv.com

Wed, Dec 13, 2023 at 10:50 PM

Dear Team,

Greetings from Wise Finserv.

In reference to the trail mail, we'll be aligning the campus drive of the Interested candidates for 16<sup>th</sup> December 2023. We'll be notifying you of the schedule for the same beforehand.

Thanks & Regards

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**Utprerika Srivastava**

HR & Operations Executive

Investments Product & Services

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**From:** Placements SRHU <[placements@srhu.edu.in](mailto:placements@srhu.edu.in)>

**Sent:** 13 December 2023 16:14

**To:** Utprerika Srivastava <[utprerikasrivastava@wisefinserv.com](mailto:utprerikasrivastava@wisefinserv.com)>

**Subject:** Re: Proposal to Hire Freshers 2023 - 2024 Batch - Wise Finserv Pvt Ltd.

Dear Ma'am,

[Quoted text hidden]

[Quoted text hidden]

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7/23/25, 11:20 AM

Swami Rama Himalayan University Mail - Proposal to Hire Freshers 2023 - 2024 Batch - Wise Finserv Pvt Ltd.