Anna Catherine M

CERTIFIED FINANCIAL PLANNER® · Kochi, Kerala, India · mannacatherinem@gmail.com ·
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CERTIFIED FINANCIAL PLANNER® with five years in comprehensive, goal-based financial planning across investments, insurance, retirement, tax efficiency and cash flow. Experienced in end-to-end client onboarding, risk profiling, goal mapping and portfolio construction, with a client-first approach weighted toward long-term outcomes rather than product sales.

EXPERIENCE

2022 – Present **Certified Financial Planner**
Steps by Geojit · Kochi

- Deliver comprehensive financial plans spanning investments, insurance, retirement, tax efficiency and cash-flow management
- Own client onboarding end to end — risk profiling, goal mapping and portfolio construction
- Conduct periodic portfolio reviews and rebalancing against client objectives
- Independently manage transferred client relationships and advisory portfolios
- Educate clients on mutual funds, asset allocation and long-term wealth strategy

Apr – Jun 2022 **Research Analyst**
FinoFy Technologies Limited · Mumbai

2021 – 2022 **Financial Planner**
Armstrong Capital & Financial Services Pvt. Ltd. · Bengaluru

- Joined as an intern in April 2021; moved into a full-time planning role that August

CERTIFICATIONS

2023	CERTIFIED FINANCIAL PLANNER® — FPSB India Credential ID 80239461
2025	NISM Series XXI-A — Portfolio Management Services Distributors
2025	NISM Series X-B — Investment Adviser (Level 2) Valid to Aug 2028 · NISM-202100043249
2025	NISM Series X-A — Investment Adviser (Level 1) Valid to Jul 2028
2022	Qualified Personal Financial Professional® — Network FP

EDUCATION

2022 – 2024 **MBA, Finance & Financial Management**
SVKM's Narsee Monjee Institute of Management Studies (NMIMS)

2017 – 2020 **B.Com, Banking & Insurance**
Sahrudaya College of Advanced Studies, Kodakara

SKILLS

Comprehensive Financial Planning · Goal-Based Investing · Mutual Fund Advisory · Asset Allocation · Retirement Planning · Insurance Planning · Portfolio Review & Rebalancing · Risk Profiling · Cash-Flow Management · Client Relationship Management