

NISCHAL KHATRI

Gwarko, Lalitpur, Nepal

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Professional Summary

I am a skilled and detail-oriented Paraplanner with 2 years of experience in financial planning. My expertise includes financial modelling, insurance analysis, tax minimization strategies, risk management, self-managed super fund, and retirement planning. I have a proven track record of creating and implementing comprehensive financial strategies and delivering actionable financial recommendations. I am recognized for providing detailed financial advice and supporting advisors to enhance operational efficiency. My strong analytical skills and attention to detail are complemented by a demonstrated ability to support executives and improve planning processes. I excel at multitasking effectively in fast-paced environments to achieve successful outcomes.

Skills

Technical Skills:

- Financial Modelling & Planning
- Insurance Analysis & Comparison
- Retirement Planning & Superannuation
- Budgeting & Cashflow Management
- Documentation & Reporting
- Microsoft Office Suite (Word, Excel, Outlook)
- Financial Analysis Tools (Irate, Morningstar, Chant West)

Soft Skills:

- Analytical Thinking & Problem Solving
- Attention to Detail
- Communication
- Team Collaboration & Interpersonal Skills
- Multitasking & Time Management

Work Experience

Paraplanner

Avaya Machine Pvt Ltd

(Outsourcing for Ready Advice Pty Ltd and Peak Pinnacle Financial Pty Ltd)

November 2022 – Present

- Conduct detailed analysis of clients' financial situations to assist advisors in developing tailored financial plans.
- Conduct thorough super fund comparisons using Irate, Morningstar and Chant West.
- Perform detailed insurance needs analysis.
- Research and compare insurance options on various insurance websites.
- Prepare and review Statement of Advice (SOA), Record of Advice (ROA), Annual Review, financial reports, investment proposals, and client correspondence.
- Collaborate with marketers to gather necessary information.
- Handle ad hoc office tasks and assisting with day-to-day operation.

Operation Head

Yellow Pomelo The Restro, Jhamsikhel, Lalitpur

August 2021 – October 2022

- Controlled operational costs, successfully implementing measures that reduced waste by 15%.
- Created and maintained detailed revenue and expense reports on a weekly, monthly, and annual basis, improving financial transparency.
- Trained staff on customer service best practices, leading to a 25% increase in customer satisfaction scores.
- Managed inventory, supervised shifts, and ensured strict adherence to health and sanitation regulations.
- Managed the company's social media accounts, created engaging content, and interacted with followers, boosting engagement by 30% through targeted content creation.

Account & Administrative Officer

Nine Pharma, Subidhanagar, Kathmandu

November 2019 - July 2021

- Managed accounting records, ensuring accurate transaction documentation and financial reporting.
- Performed administrative tasks, including the preparation of correspondence, reports, and emails, improving office communication.
- Handled petty cash management, payment processing, and day-to-day bookkeeping, reducing outstanding payments by 20%.
- Analysed budgets and expenditures, prepared vouchers, and followed up on outstanding debts, enhancing financial tracking and accountability.
- Provided administrative support, managing incoming calls and redirecting inquiries as needed.

Education

Bachelor of Business Studies (BBS)

Patan Multiple Campus, Tribhuvan University

2024

+2 Higher Secondary Examination

Lok Smriti Higher Secondary School

2019

Secondary Education Examination (SEE)

Lok Smriti Higher Secondary School

2017

Relevant Training and Short-Term Courses Attended

Course Title: Accounting and Taxation Training

Focus Area: Tally, VAT, TDS

Year: 2019

Organization: Institute of Accounting Training Nepal (IATN)

References

Mr. Darius Telegaru

Organization: Ready Advice Pty Ltd

Contact: 0493 088 578

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Ms. Taylor Bannister

Organization: Ready Advice Pty Ltd

Contact: 0493 088 578

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Mr. Yankat Naidu

Organization: Peak Pinnacle Financial Pty Ltd

Contact: 0493 103 617

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Mr. CA. Bikash Chapagain

Organization: Institute of Accounting Training Nepal (IATN)

Contact: (977) 9868838244

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Mr. Shaswot Bhattarai

Organization: Nine Pharma

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