

## **Yogita Swar Dand**



### **About Me**

Yogita Dand, Co-Founder, Asky Financial Services having been passionate about finance since her childhood, has a rich experience in the finance and accounts field, having worked for about 20 years in the same field. Till the year 2010, she was working as a CFO in a private company, as also carrying on investment advisory business alongside, albeit on a small scale. Upon completing her CFP certification course in 2011, she found her calling in financial planning and wealth management and quit her lucrative job to pursue her dream and passion. She has since been working in close association with the Winvestor campaign run by DSP Blackrock Fund Managers P.Ltd, an initiative for educating the women investors as also successfully managing the firm alongwith Co-Founder Anil Gulrajani.

On a personal note, she is very passionate about travelling and an avid reader. She is quite a social person and defines her family as her universe. Hand embroidery acts as a stress buster for her and hence she also encourages everyone to take up one hobby they are passionate about.

**Viewed my profile** - 6553 Members

**Peoples Favourite** - 7 Members

**Review** - 0 Members

### **Total Experience**

8 Years

### **Experience as an Advisor**

8 Years

### **Qualification**

B.Com, CFP

## **Service and Advisory Offered**

Mutual Fund

Life Insurance

Post Office Schemes

Tax Consultancy

Online Tax Return Filing

Certified Financial Planner (CFP)

Real Estate Brokers

Portfolio Management Schemes

Pan Service Providers

NPS (National Pension Scheme)

IPOs, Bonds & NCDs

Housing Loans

Personal Loan

Will Writing Services

Technical & Research Analysis

Property Management Services

Fixed Deposits

## **Focus Area**

Mutual Fund

Certified Financial Planner (CFP)

Will Writing Services

## **Affiliations**

Part of the Winvisor team of DSP Blackrock Mutual Fund

## **Awards & Recognition**

Not Specified

## **Reviews**

No Reviews Present

## **Address**

Yogita Swar Dand

1 A, Pareira Sadan, Opp Natraj, Studios, Sir M.V. Road, Andheri (E)

Andheri East

Mumbai

Maharashtra - 400069

## **License**

Mutual Fund - ARN No.71991 - 31-07-2016

Life Insurance - IRDA No.1831862 - 30-11-2013

Certified Financial Planner (CFP) - FPSBI No.00040009 - 31-12-2050