

JANICE TELMA RODRIGUES

Investment Operations & Wealth Servicing Professional

Contact

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- Goa, India
- Open to relocation: UAE

Core Competencies

- Investment & Wealth Operations
- Mutual Fund & Equity Transaction Processing
- Client Relationship & Service Management
- Portfolio Reconciliation & Reporting
- Tax Filing & Regulatory Compliance
- Insurance Policy Servicing
- Financial Documentation & Controls

Certifications

- IC-38 Certificate: Life Insurance
- NISM Series VA: Mutual Fund Distribution
- NCFM: Capital Market (Dealers) Module
- Course on IT Training (ICAI)

Languages

- English (Fluent)
- Hindi (Conversational)
- Konkani (Conversational)

Professional Summary

Results-driven finance professional with 6+ years of experience in investment operations, wealth servicing, taxation, and regulatory compliance. Currently managing a substantial Assets Under Management portfolio across 2,800+ investment clients and supporting 1,000+ tax clients. Strong expertise in transaction processing, portfolio reconciliation, documentation control, and high-volume client servicing within regulated financial environments. Recognized for service excellence and operational accuracy.

Professional Experience

PoixePlus

Finance Executive -- Investment Operations & Client Servicing

Margao, Goa, India · Nov 2021 – Present

(PoixePlus: A financial services firm specializing in investment operations, tax planning, insurance, and wealth advisory.)

- Oversee operational management of Assets Under Management across 2,800+ investment accounts.
- Execute mutual fund subscriptions, redemptions, switches, and equity transactions with accuracy and timeliness.
- Perform portfolio reconciliation and ensure alignment with internal records.
- File income tax returns for 1,000+ clients ensuring full regulatory compliance.
- Manage servicing of 100+ insurance portfolios (life, health & general).
- Coordinate directly with clients for documentation, compliance, and transaction confirmations.
- Awarded **Best Client Support Team** recognition (2024 & 2025) for service excellence.

Milestone Financial Consultants

Client Servicing & Advisory Operations Support

Margao, Goa, India · May 2019 – Oct 2021

(Milestone: A brokerage firm specializing in mutual funds, stocks, and investment instruments.)

- Processed client investment instructions across mutual funds and capital markets.
- Conducted detailed portfolio data reconciliation and performance tracking.
- Managed onboarding documentation and compliance verification.
- Supported senior advisors in maintaining operational efficiency.

CA Ganesh Daivajna & Co.

Corporate Intern -- Tax & Audit

Margao, Goa, India · Dec 2018 – Apr 2019

- Filed GST returns (GSTR-1 & GSTR-3B) for multiple clients, maintaining compliance with statutory deadlines.
- Assisted in internal audits and strengthened compliance controls.

Education

Master of Business Administration (Financial Services)

Goa University | Taleigao, Goa, India

2019

- ▶ Secured 2nd Rank in University Examination · GPA: 9/10
- ▶ Dissertation: "An Empirical Study of Scheduled and Non-Scheduled Events on Nifty 50" — analyzed event impacts, concluding non-scheduled events have a more significant effect.

Bachelor of Commerce

VVM's Shree Damodar College of Commerce & Economics | Margao, Goa, India

2016

- ▶ Percentage: 71.15% · Major: Financial Accounting, Auditing & Taxation

Technical Skills

- ▶ **Software & Platforms:** MS Excel (Pivot Tables, VLOOKUPS), Tally, Income Tax Portal, GST Portal.
- ▶ **Operations & Analysis:** Financial Reconciliation, Transaction Processing, Portfolio Reporting, Data Accuracy & Controls.
- ▶ **Client & Communication:** Client Relationship Management, Documentation Management, Written & Verbal Communication, Problem-Solving.

Declaration

I hereby declare that the above furnished particulars are true and correct to the best of my knowledge and belief.

Janice Telma Rodrigues

Updated: May 2026

JANICE TELMA RODRIGUES

Key Highlights

- ★ **6+ Years**
In investment operations & wealth servicing
- ★ **2,800+**
Investment clients serviced
- ★ **1,000+**
Tax clients supported
- ★ **Best Client Support Team**
Recognition, 2024 & 2025

Career Focus

Seeking to bring proven investment-operations and client-servicing expertise to a leading financial institution in the UAE, contributing operational precision and regulatory diligence to a fast-paced wealth-management environment.

Personal Details

- 🇮🇳 Nationality: Indian
- 💍 Marital status: Married
- ✈️ Open to relocation across the UAE

Additional

- 📄 References available upon request.