



MEENA KOTHARI

Professional Financial Advisor, LIMRA (USA)
Soft Skill Trainer (ICBI)

"Striking rapport from the word go, making each interaction count is my strong forte"

Kesariya Advisory



Secure, Cure & Mature

About

Born & brought up in North Lakhimpur, Assam, I did my CA (Inter) with a three year articleship in Chennai after doing my graduation in Commerce. I began my professional journey in the year 2009 at **Max Life** as an **Advisor**. My natural flair for communication has helped me establish business relations effortlessly & retain my clients. I have carved a niche for myself as

Star Level Advisor (Platinum Advisor), and have been accredited as a **Professional Financial Advisor (PFA)** by **LIMRA, Windsor, Connecticut**. With Finance as my strong suit, I have managed to acquire a **clientele base of 1568 PAN INDIA & abroad**. So far, the total sum assured cover is **1685 crores** with a **one claim for life**.

As a member of **Million Dollar Round Table (MDRT)**, I was fortunate enough to represent India in **Canada & California**. I am a **Soft Skill Trainer (ICBI)**, accredited by **Scottish Qualification Authority (SQA) & National Accreditation Board of Education & Training (NABET)** & have achieved the Customized Award for Professional Program 'Train the Trainer'.

I am currently a **Business Networking International (BNI) Launch Director** of **BNI Bhopal**, **President of MP State Child Care Council for Women's Indian Chamber of Commerce and Industry (WICCI)**. **Vice President training for JCI Bhopal**.

Accolades

I had the privilege to be awarded as one of the Best Advisors on multiple occasions in many cities across India & in more than 20 countries like **Singapore, Phuket, Sri Lanka, Germany, Dubai, Bangkok & Macau**. I am a recipient of **CEO Council Award in London, Switzerland, Amsterdam, Cape Town, Istanbul** & have been honoured by MDRT in **Toronto & Los Angeles**.

Training programmes

After gaining ten years of experience in the field, I tried developing my skills through various training programs, workshops & conferences. I subsequently started mentoring the newbies through sessions, workshops and pro bonos. So far I have conducted various trainings programs on **Communication Skills, Time Management, Emotional Intelligence, Holistic Family Development, Parenting Skills, Financial Planning** in eminent institutions like **SBI Mutual Fund, Om Optel Industries, Surat Finance Association, 6th Battalion Jammu & Kashmir Rifles Hong Kong Jain Society, J.H. Government College Betul & St. Mary's School**.

Social and Spiritual Activities

I am a highly involved & proactive **Social Worker**. I have been doing my bit by arranging **Girl Empowerment Workshops** in India & abroad to inspire, educate & empower the young girls. I am also a performer, debater & an anchor. Completed Nawanu Yatra at Palitana Ji (2016).

Family

The relentless support I have been getting from my husband, **Mr. Pramod Kothari**, Proprietor of Kesariya Finance Company & my son **Shreyansh Kothari**, a Computer Engineer from VIT Vellore, is ineffable.



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