



KASIDIS RATTANAWIJIT

Entry-level Wealth Advisor / Investment Consultant candidate

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SUMMARY

Economics & Investment graduate from Bangkok University with **First-Class Honors** (GPA 3.92), OIC life insurance agent license, and IC P1–P2 passed before graduation. Gained hands-on financial planning and client-facing experience during a Muang Thai Life co-op, including closing 2 real clients and building CFP-style planning models.

LICENSES & EXAMS

- Life Insurance Agent License — OIC-registered, No. 68010xxxxx, valid until 21 Dec 2026
- IC P1 (plain products) — passed first attempt, 9 Nov 2024 (ATI) · IC P2 (complex: debt & mutual funds) — passed 7 Dec 2025 (ATI)
- Next: IC registration » IC P3 » CFP program (9 modules) — target CFP certification by 2029

EXPERIENCE

Muang Thai Life Assurance — Cooperative Internship, Super Agent Program

Head Office, Ratchadaphisek, Bangkok | 15 Jan – 24 Apr 2026

- Worked as a licensed agent during the co-op and closed 2 real clients, including senior-level professionals.
- Won an internal financial-planning pitch competition and was selected as a co-presenter for the MTLxBU seminar.
- Trained with two practicing CFP professionals and developed a 28-sheet CFP-style planning workbook.
- Supported hospital promotion booths and handled client conversations with prospects.
- Received grade A in both cooperative-education courses: EC433 and EC435.

EDUCATION

Bachelor of Economics and Investment — First-Class Honors (เกียรตินิยมอันดับ 1) 2022 - May 2026

School of Economics, Bangkok University | GPA 3.92

KEY PROJECTS

- DrinkSync business plan — Led a 16-slide pitch and 42-page report; developed a 20-sheet Excel model covering NPV/IRR, cash flow, and break-even analysis. Grade A.
- National disaster-warning system appraisal — Led a 50-page economic appraisal report and developed a valuation model using population, income, and life expectancy data. Grade A.
- CFP case analysis — Authored and presented a full-process planning case, supported by a 28-sheet Excel workbook.

SKILLS & LANGUAGES

Financial: Financial modeling, NPV/IRR, cash flow, break-even, CAPEX, CFP-style planning

Investment: IC P1–P2 level products, portfolio analysis, product suitability

Tools: Excel financial models, Pivot Tables, Power BI basics, dashboards

Languages: Thai native, English CEFR B1.1, Japanese basic, Chinese learning