

WEALTH MANAGEMENT CONVENTION - 2022

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0900 Hrs – 0910 Hrs

WELCOME ADDRESS

Vyas Rai Nagpal, Co-Founder & Director Marketing
& Business Development, American Academy of
Financial Management[®] India

0910 Hrs – 1005 Hrs INAUGURAL SESSION

Felicitation of Financial Industry Veterans

0910 Hrs – 0940 Hrs

**&
Convocation Ceremony for AAFM Certificants**

0940 Hrs – 0950 Hrs

KEYNOTE ADDRESS

Sunil Zode, Chairman, Indian Chamber of
Commerce for Affirmative Action

0955 Hrs – 1005 Hrs

CHIEF GUEST

Shankar Jadhav, Managing Director - BSE
Investment & Head - Strategy - BSE

1010 Hrs – 1025 Hrs

PRESENTATION

Sandeep Tandon, Founder & CIO, Quant Group
"DYNAMIC STYLE OF MONEY MANAGEMENT -
NEW INVESTMENT MANTRA OF 21ST CENTURY"

1030 Hrs – 1045 Hrs

PRESENTATION

Anooj Mehta, Head-Partner Success, 1 Finance
"Future of Financial Advisory - What Will it take for
Advisors to Stay RELEVANT"

1050 Hrs – 1105 Hrs

PRESENTATION

Basavaraj Mugabast, Head - Health Agency,
SBI General Insurance
"Building A Personal Brand"

☕ NETWORKING TEA BREAK — 1105 Hrs – 1135 Hrs ☕

1140 Hrs – 1220 Hrs

PANEL DISCUSSION

MODERATED BY

Mr. Deepak Jain
Founder & Director,
AAFM[®] India

WEALTH MANAGEMENT & ADVISING

**Tailoring your value proposition to increase
UHNWI engagement**

Richard Pattle LVO, Co-Founder and CEO, True Beacon &
Senior Advisor Zerodha

Dhiraj Padiyath, Head - Product & Platform, Yes Securities
Nitin Shanbhag, Head - Investment Products, Private
Wealth, Motilal Oswal Group

K S Rao CWM[®], EVP & Head - Investor Education &
Distribution Development, Aditya Birla Sun Life MF

1225 Hrs – 1240 Hrs

PRESENTATION

K S Rao CWM[®], EVP & Head - Investor Education &
Distribution Development, Aditya Birla Sun Life MF
"AMRITKAAL of Wealth Advisory"

1245 Hrs – 1300 Hrs

PRESENTATION

Aakash Bansal, Co-Founder & CEO, Vijya Fintech
(Building Mercury)
"Bringing Efficiency & Scale"

🕒 LUNCH — 1300 Hrs – 1350 Hrs 🕒

1400 Hrs – 1415 Hrs

PRESENTATION

Mitesh Shah, Co-Founder, Inflection Point Ventures
“Why NOW is the Right Time for Angel Investing”

1420 Hrs – 1435 Hrs

PRESENTATION

Anuraag Saboo, Co-Founder, Fundexpert Fintech
“4Ms for Multiplying your Business as
Financial Advisor/Distributors”

1440 Hrs – 1520 Hrs

PANEL DISCUSSION

MODERATED BY

Mr. Deepak Jain
Founder & Director,
AAFM® India

PMS & ALTERNATIVE INVESTMENT
Evolving Alternative Investment & PMS in India –
A PORTFOLIO MUST HAVE!

Anshul Saigal, CIO - Kotak Portfolio Management Services,
Kotak AMC
Dhaval Kapadia, Director-Portfolio Specialist, Morningstar
Investment Advisers India
Rajnish Girdhar, CEO of Karma Capital
Mohamed Irfan, Fund Manager, Vivriti Asset Management
Apoorva Vora, Founder & CEO, Finolutions LLP

1525 Hrs – 1540 Hrs

PRESENTATION

Vetri Subramaniam, CIO, UTI Asset Management
Company Ltd
“Opportunities in the VUCA World”

1545 Hrs – 1600 Hrs

PRESENTATION

Tejas Thakur CWM®, Head - Sales Training, Kotak Mahindra
Asset Management Company
“Intergenerational Business Transfer”

1605 Hrs – 1620 Hrs

PRESENTATION

Krishna Sanghavi, CIO-Equities, Mahindra
Manulife Investment Management
“Why does Psychology Matter in Financial Planning”

1625 Hrs – 1640 Hrs

PRESENTATION

Nitin Nahar, Head - Business Development, Whiteoak
Capital AMC
“Freedom : Now And Ahead”

1645 Hrs – 1700 Hrs

PRESENTATION

Deep Sen, CEO & Co-Founder, India Housing
For All Pte. Ltd.
“Leadership Capital to Develop Green Affordable Housing”

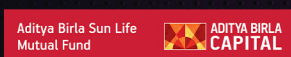
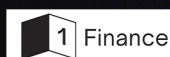
1700 Hrs

CLOSE OF SESSION

Dimple Mittal, Head - Business Development,
AAFM® India

☕ NETWORKING TEA — 1700 Hrs ☕

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Venue - BSE International Convention Hall - 1st Floor, Phiroze Jeejeebhoy Towers,
BSE, Dalal St, Fort, Mumbai, Maharashtra- 400001