Aditya G

CFP (CM) | MBA | FIDUCIARY

Date Of Birth
03 December 1981

LinkedIn
adityago

SKILLS

MS Office Advanced	**Tally/Quickbooks** Advanced
Data Analytics Intermediate	**ITR Filing** Intermediate
CRM Intermediate	**HTML/CSS** Beginner
Sys Admin Beginner	**Python/CLI** Novice

LICENSES & CERTIFICATIONS

CFP (CM)
Financial Planning Standards Board — June 2011

Wealth Management
New York Institute of Finance — November 2006

Portfolio Management
New York Institute of Finance — February 2006

Certificate in Data Science
LinkedIn — July 2021

Sales: Selling Financial Products and Services
LinkedIn — August 2021

HOBBIES

Golf, squash, swimming, bridge
Photography & photocomposition
Essay writing & book reviews

OBJECTIVE & STRENGTHS

Objective: Build domain expertise in investment & wealth advisory space.
Strengths: Talents include concise communications & divergent thought process. ➤ Jack of all trades -- financial analysis, IT applications, front-end website coding, graphic design, & structured essay writing. ➤ Thrives in stable and 'chaotic' environments. ➤ Curious, creative, inquisitive, and autodidact. ➤ Keen listener.

WORK EXPERIENCE

Certified Financial Planner
Self Employed
(February 2014 - Present)

➤ Comprehensive (goal-based) financial planning ➤ Investment planning including stock-picking ➤ Behavioural coaching ➤ Risk Management ➤ Asset allocation

Srihari & Co, Chartered Accountants
Tax Consultant & Planner
(July 2015 - August 2018)

➤ **Key Achievement**: Created Kanban workflow to assist audit team workflow & boosted productivity by 50+%. ➤ Filed 50+ income-tax returns on behalf of both individual & corporate clients. ➤ Undertook essential filings such as Form 15CA/CB for NRI/HNI repatriations & TDS filings ➤ Essential team member for statutory audits of select high profile NGOs ➤ Single-handedly transitioned the firm to cloud-based Zoho eco-system ➤ Prepared financial statements of over 10+ MSMEs ➤ Designed website using Wordpress platform, copy-edited & wrote firm's content. ➤ Principal troubleshooter for firm's IT systems

Moneywise Media Private Limited
Contributing Writer and Analyst
(December 2011 - February 2014)

➤ **Key Achievement:** Mandated SEBI to disclose PMS data for the general public viz RTI, which turned out to be a watershed moment in Indian capital markets. ➤ Co-wrote, copy-edited & screened articles, both in print & online formats. ➤ Instrumental in RTI initiatives towards transparency from regulatory watchdogs, especially from SEBI, with help of Moneylife team. ➤ Laid the foundation in creating Moneylife Foundation & Legal Helpline websites. ➤ Assisted in production of media for Moneylife Foundation events, including photos & videos. ➤ Principal book reviewer.

Karvy Private Wealth
Research Analyst
(June 2011 - December 2011)

➤ Equity research analyst for PMS division

Anush Shares & Securities Private Limited
Investment Advisor & Research Analyst
(May 2005 - June 2011)

➤ **Key Achievement**: Single-handedly devised, designed, and implemented the firm's internal systems centred around Google Apps and MS Sharepoint, despite having no prior knowledge in sys-admin, DevOps, IT infrastructure systems, coding. ➤ Instrumental in setting up 1-on-1 investment advisory for High Networth Individuals ➤ Team leadership, coordinated the Equity Research team for 10+ institutional clients

EDUCATION

Great Lakes Institute of Management
MBA Finance & Management
(June 2004 - May 2005)
7.2 GPA

University of Madras
B.Com Accounting & Economics
(June 2000 - October 2003)
61% [First Class]

Scored 100% in statistics & operations research

Vidya Mandir Senior Secondary School, Mylapore
CBSE Commerce [elective: advanced mathematics]
85%

PROJECTS AND PUBLICATIONS

Moneylife Magazine
https://www.moneylife.in/author/aditya-govindaraj.html

A collection of articles written for Moneylife magazine, a well known media house run by Padma Shri Ms Sucheta Dalal

Photography
https://adityag.netlify.app

A collection of street, abstract, and portraitures