



Aditya G

CFP (CM) | MBA | FIDUCIARY



Date Of Birth

03 December 1981

LinkedIn

adityagovindaraj

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 (February 2014 - Present)
Self Employed

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

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

➡ **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 (December 2011 - February 2014)
Contributing Writer and Analyst

➡ **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 (June 2011 - December 2011)
Research Analyst

➡ Equity research analyst for PMS division

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

➡ **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 (June 2004 - May 2005)
MBA Finance & Management 7.2 GPA

University of Madras (June 2000 - October 2003)
B.Com Accounting & Economics 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