



Aditya Govindaraj  
CFP (CM) | MBA



**Website**  
<https://adityag81.github.io/>  
**Date Of Birth**  
03 December 1981  
**LinkedIn**  
adityagovindaraj

SKILLS

<b>Tally/Quickbooks</b> Advanced	<b>MS Office</b> Intermediate/Adv.
<b>ITR Filing</b> Intermediate	<b>CRM</b> Intermediate
<b>HTML/CSS</b> Beginner	<b>Python/CLI</b> Novice

LICENSES & CERTIFICATIONS

<b>CFP (CM)</b> Financial Planning Standards Board	June 2011
<b>Wealth Management</b> New York Institute of Finance	November 2006
<b>Portfolio Management</b> New York Institute of Finance	February 2006
<b>Certificate in Data Science</b> LinkedIn	July 2021

HOBBIES

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

OBJECTIVE & STRENGTHS

➤ **Objective:** Build domain expertise in family office & wealth management.  
➤ **Strengths:** An achiever and quick learner, I have always delivered and met employers' expectations. ➤ I wear many hats -- financial analysis, IT applications, front-end website design & coding, graphic design, journalism & essay writing. ➤ I possess a growth & creative mindset, conducive to inquiry & creative problem solving. ➤ Curious, inquisitive, and autodidact.

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

<b>Great Lakes Institute of Management</b> MBA Finance & Management	(June 2004 - May 2005) 7.2 GPA
<b>University of Madras</b> B.Com Accounting & Economics	(June 2000 - October 2003) 61% [First Class]
Scored 100% in statistics & operations research	
<b>Vidya Mandir Senior Secondary School, Mylapore</b> 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