



Aditya Govindaraj

CFP (CM) | MBA | FIDUCIARY



Date Of Birth

03 December 1981

LinkedIn

adityagovindaraj

SKILLS

<b>MS Office</b> Advanced	<b>Tally/Quickbooks</b> Advanced
<b>Data Analytics</b> Intermediate	<b>ITR Filing</b> Intermediate
<b>CRM</b> Intermediate	<b>HTML/CSS</b> Beginner
<b>Sys Admin</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
<b>Sales: Selling Financial Products and Services</b> 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** 85%  
CBSE Commerce [elective: advanced mathematics]

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