



FINANCIAL EDUCATION WEEK 2020

17th May - 23rd May 2020

A Financial Literacy Initiative by AIWMI

Membership Partner

eXqualifi
AIWMI Membership Network



SkillUp

Financial Certifications

About the Scholarship:

It has been a tough few weeks for everyone as we navigate a new normal amid the coronavirus pandemic. Professionally, most of us are working from home with an indefinite timeline of when we'll be returning to our offices.

In this period to help students and financial services professionals use this free time to upskill themselves, AIWMI is offering 100% Scholarship on the registration fee of various AIWMI education programs in Wealth Management, Family Office Advising, Credit Research, Alternative Investments, Investment Research, Private Banking, Retail Banking, Corporate Valuation, Trust & Estate Advisory, Treasury Management, Risk & Compliance and Fixed-Income Investing.

For more information,
please call AIWMI on **+91 88281 16801 | 02 | 03** or write to
certifications@aiwmindia.com



On behalf of **Association of International Wealth Management of India (AIWMI)**, I wish to extend appreciation to all the volunteers and speakers who participated in the **Financial Education Week 2020 (FEW20)**.

The core idea behind the Financial Education Week is to educate the masses on how they can take simple steps to improve their finances and create wealth. In its fifth edition this year, the Financial Education Week was entirely celebrated online from May 17 to May 23, 2020, thanks to the lockdown which was in effect due to Covid19.

This Report presents highlights of the FEW20 campaign that was conducted countrywide with an emphasis on empowering people through key lessons on money management and financial planning.

The success of the Financial Education Week 2020 was only possible with the support and the participation of our esteemed stakeholders, our team and last but not the least our volunteers/speakers among others. As a result of this generous support and time commitment of everyone involved, the outreach activities benefitted a large section of the population countrywide.

A total of 5,650 individuals attended the 72 sessions conducted during FEW20. Close to 2,50,000 individuals were reached directly through mailers, short-text-messages (SMS) and the social media. This highlights the important role of social media in disseminating financial literacy messages. Feedback reports from the participants also indicate that the audience was very receptive to FEW20. It is anticipated that the impact of the FEW20 will go way beyond the numbers reached, through the multiplier effect.

Financial Education Week 2020 is a one-of-its-kind, pro bone initiative on financial literacy in India. We at AIWMI are committed to promoting financial literacy and inclusion and we eagerly look forward to your participation in our future initiatives.

Once again we sincerely thank all our Volunteers & Speakers for their stellar role in conducting the Financial Education Week 2020.

Best Regards,

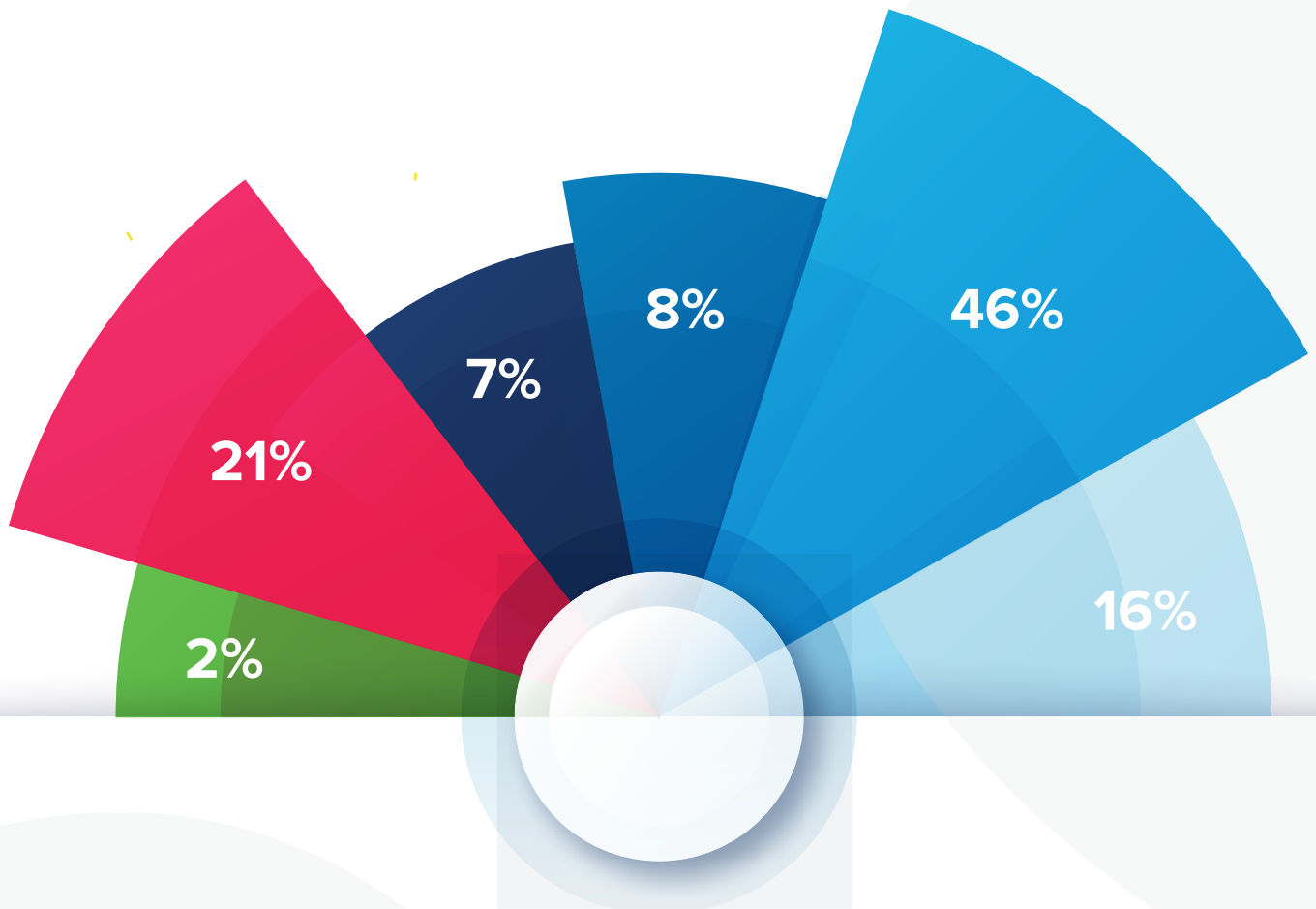
Aditya Gadge

Event Highlights



Event Highlights

Audience



Already Retired



Working Professionals



About to Retire



School Students



College Students



Couples & Families

Trainer Profiles



Abhishek Sinha
Assistant Professor
VJIM



Aditya Pathak
Senior Vice President
Ladderup Wealth Management



Alpa Shah
Founder
Empower Education



Amit Pandya
CEO
AKruti Financial Technologies



Anirudh Gupta
CEO & Principal Adviser
Ashiana Financial Services



Anuj Kesarwani
Financial Planner



Anurag Raj
Data Scientist III
General Mills



Arun Chaubey
Financial Trainer



AV Senthil
Founding Partner
Tejas Family Solutions LLP



Binal Sheth
Founder & Financial Planner
Wealth Solution



Chetana Asbe
Faculty of Finance and Accounting,
N. L. Dalmia Institute of Management
Studies and Research,



Devesh Mundra
Assistant Manager
Anand Rath Private Wealth



Dishit Parekh CA
Founder
Foresight Financial Advisories



Jaideep Shirali
Proprietor



Javier Gonzalez Nuñez
Strategic Project Manager
Lombard International Assurance



Jay Shah
Founder and CEO
Finwisor

Trainer Profiles



Karan Sahi
Consultant
Vaish Associates Delhi



K Rajendra Prasad
Associate Professor
Sanskriti School of Business



Kaustubh Deole
Founder & Financial Planner
Artharthi Financial Services



Lakshay Piplani
Business Analyst
Self-employed/freelancer



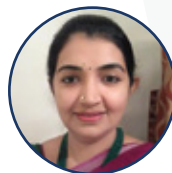
Minakshi Todi
Faculty of Finance
ISME School of Management
and Entrepreneurship



Naela Rushdi
Director & Professor
IILM Lucknow



Narendra Rahul Amuloju
Founder & CEO
Amuloju Parna Technologies



Navya V
Associate Professor, School
of Management Studies
Chinmaya Institute of Technology



Nirav Hemani
Co-Founder and CEO
Weinvest Financial Consultants
Private Limited



Peeyoosh Agrawal
Founder & Managing Partner
myFin Advisor LLP



Prakash J Sheth
Proprietor
Sheth Finance Consultancy



Prasanna Kumar
Founder
WealthStroke Financial



Priyanka Acharya
Communication Consultant
Priy-Anka Consulting Co.



Punit Sethia
Founder
Apaarr Global Advisory



Rajat Mehrotra
Independent Financial Planner



Ramprasad Murthy
Financial coach and Faculty
NIIT, Pune

Trainer Profiles



Ranu Jain
Assistant Professor
SIMSREE



Ruchika Agarwal
Assistant Professor - Finance
& Economics
N. L. Dalmia Institute of
Management Studies and Research



Sapna Tiwari
Certified Financial Planner



Satish Vadapalli
Consultant Pediatrician
& Neonatologist
Seven Hills Hospital



Shraddha Kokane
Programme Director - Banking &
Financial Services MIT- WPU



Shweta Purswani
Senior Manager
C&IB, RBL Bank



Sunil Kapadia
Certified Trainer



Tanmayananda Chattaraj
Assistant Professor of Accounting
& Finance
St. Xavier's University



Thimma Vidyasagar
CEO
Thimma International
Management Academy

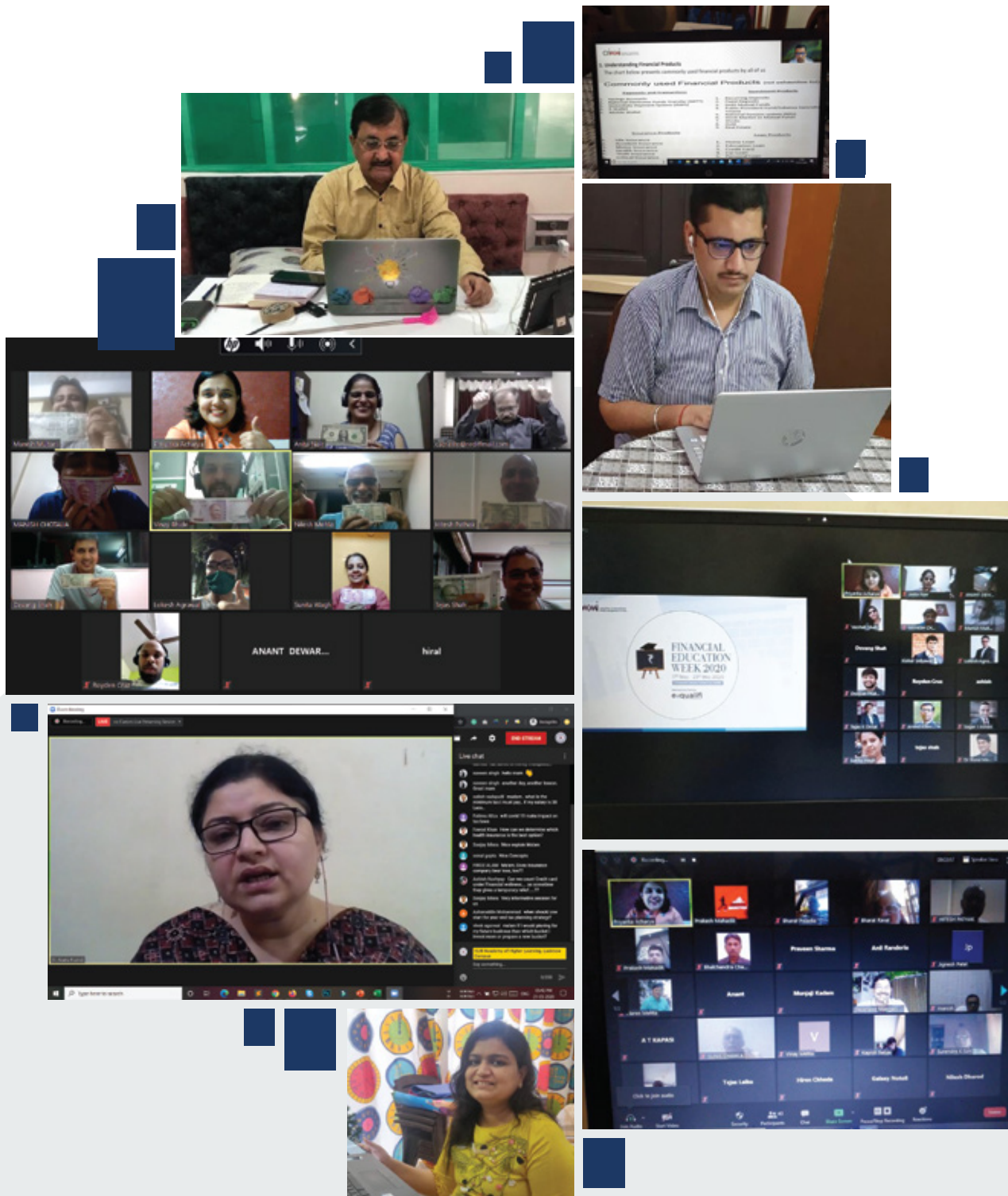


Vinny Arora
Assistant Professor
Delhi University



Zeal Doshi
Financial Planner

Glimpses of FEW 2020



Glimpses of FEW 2020



Quotes




Dare to do what only 1% of world's population is doing to live a financially independent life.

“Money is plentiful for those who understand the simple laws which govern its acquisition.”



It's Time,
Let's
implement
the Plan!

"Time is
 money."

"Investing should be more like watching paint dry or watching grass grow. If you want excitement, take \$800 and go to Las Vegas."

- Paul Samuelson

"A good financial plan is a road map that shows us exactly how the choices we make today will affect our future."

"Person can fail but systems never. Create A Goal and Work to Achieve Your Goal."



A well elaborated financial plan will include goals, time horizon, rate expectation & risk profile.

“If you take care of money in the beginning, money will take care of you in the end.”

"Returns is a By-Product; RISK is the Raw Material."

"You work hard for money, how hard does money work for you."

"One must die rich / savings & investments must start at earliest age / invest own funds."

"Great investing requires a lot of delayed gratification. Charles Munger."

"If you fail to plan, you plan to fail."

"It's not how much money you make but how much money you keep, how hard it works for you, and how many generations you keep it for."

- Robert Kiyosaki.



Be fearful when others are greedy and greedy when others are fearful.



Earning is Easy, Spending is Easier.... The ART lies in Managing the Money!

"Invest First, Spend Later!"

"When money realizes that it is in good hands, it wants to stay and multiply in those hands."



Make Money Moil and Toil.

"Do not save what is left after spending, spend what is left after saving."

Testimonials

FEW2020 has been a great initiative to educate people about the process by which they can live a financially organized life. Post session I received lot of comments that the sessions had triggered them again to relook at their savings and investments. I believe even if few of the participants take active steps towards Financial Planning, it would be a great achievement for AIWMI.

-Ruchika Agarwal

Well a very good initiative. I look forward to more of these.

-Ramprasad Murthy

I feel proud and I wish thanks to team AIWMI for conducting such a noble cause and I continue to be a part of team AIWMI in future also.

-Rajat Mehrotra

A step in the right direction to foster financial literacy.

-Tanmayananda Chattaraj

Good initiative. Need this more frequently as people are mostly unaware of the financial aspects of life.

-Peeyoosh Agrawal

FEW 2020 is a wonderful initiative, and I am so happy to be a part of it! Its a great way to empower people and help them achieve their financial goals. I wish this initiative all the very best and I hope it can progress further.

-Minakshi Todi

I like this initiative from AIWMI, I know about FEW since last 2 years and I am happy that this time I was able to be a part of it and in future also I would like to be a part of it. I like the concept of giving back to the society in the form of Education and Awareness.

-Amit Pandya

170 View, 4 Share, 15 Comments & 86 Like on Facebook. Got more than 25 call in next 2 days after conducting webinar. And people talked of 30 minutes avg. According to discussion got reply as "Awesome". 308 Views on LinkedIn.

-Arun Chaubey

It is very fruitful exercise aimed at enhancing general financial literacy pan India.

-Devesh Mundra

The activity driven is extremely insightful for end consumers at large which helps them to take informed decisions.

-Kaustubh Deole

It was really interesting initiative. I would like to work in the long run with your organization.

-Javier Gonzalez Nuñez

Conducting the session was a good experience. To help people become financially independent is need of the hour and I am honored to be part of this

-Ranu Jain

FEW 2020 was an excellent platform to disseminate knowledge without expectations and with an aim to create a more financially literate investment environment.

-Abhishek Sinha

The initiative makes it very easy to convince people to allow conducting the program. It increases credibility and at stage, the efforts of your team in coordination are truly commendable

-Priyanka Urvish Acharya

Testimonials

I am a proud volunteer-speaker of the Financial Education Week 2020 Initiative. It is because of this initiative that so many attendees are now on their path to financial freedom and prosperity, through financial literacy and education. I had a truly enriching experience of spreading awareness about financial planning, budgeting and forecasting. I would like to thank Team AIWMI for trusting me with a session.

-Chetana Asbe

It was a great platform to educate investors During lockdown time. great opportunity to be part of it. Looking forward for more this type of weeks.

-Binal Sureshkumar Sheth

Wonderful knowledge.. really helped

-Kumaravel S

A great initiative in introducing Financial discipline across various realms of investors and creating awareness about the benefits of investments and meeting life goals

-Navya V

It's a very noble initiative by AIWMI!

-Anuj Kesarwani

The Initiative by FEW is really innovative. its gives people to showcase their skills and knowledge

-Dishit Parekh

It was my privilege to contribute in noble cause of spreading financial literacy among masses at an unprecedented times of COVID19, when managing money becomes most crucial. Looking forward to be associate with AIWMI for upcoming noble causes.

-Shweta Purswani

It was good experience. My contacts through social media platforms want to attend more such sessions.

-Shraddha Kokane

Its a great initiative. Every time I conduct a session of this kind, i am amazed at the level of ignorance amongst well educated people regarding this critical aspect. AIWMI is doing a great job.

-Naela Rushdi

AIWMI's noble cause of replacing poor information or ignorance with practical knowledge about all financial planning is highly praise-worthy. When I was given an opportunity to be a part of this academic drive, I did not blink once before grabbing the chance with both hands. Conducting a session was rewarding on multiple levels; it allowed me to champion AIWMI's mission on financial literacy and allowed me to understand and correct the perspectives on financial planning held by my attendees.

-Lakshay Piplani

Great Initiative.

-Karan Sahi

Premier Membership Network for Financial Services Professionals

Exqualifi is a premier membership network set up by Association of International Wealth Management of India (AIWMI) for financial services leaders, professionals and aspirants. Exqualifi has been designed as a continuing education platform meant to offer its members opportunities to earn professional designations; to participate in multidisciplinary knowledge initiatives, enable networking at conferences; and offer one single platform for interaction, cross-pollination of ideas and collaboration.

Exqualifi provides the opportunity for practitioners and related professionals to connect and advance their focused area of practice. They aim to benefit the practitioner, their area of specialization, the clients they serve, and the industry at large.

An exclusive, by-invite membership for Thought Leaders, Entrepreneurs and Prominent CXOs working in the Financial Services Sector.

Charter Membership

Professional Membership

A prolific membership for career-oriented professionals working in the financial services and allied sectors.

An exciting membership for full time/ part time students of undergraduate and post-graduate courses under 25 years of age.

Student Membership



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