

DAYANANDASAGAR COLLEGE OF ARTS SCIENCE AND COMMERCE

Shivage Malleshwara Hills, Kumaraswamy Layout, Bangalore-560082

Department of Management Studies

RESEARCH & IPR CELL-ANVESHANA in association with IQAC

Expert Lecture on CSIS Financial Planning and Research in Wealth Management

Department: MBA (BU)

Date: 29.08.2023

Sl. No.	Particulars	Event related Details		
1.	Event*	Expert Lecture		
2.	Title of the Event	Expert Lecture on CSIS Financial Planning and Research in Wealth Management		
3.	Date	22.08.2023 (Forenoon Session)		
4.	Time	10.00AM -12.00 Noon		
5.	Venue	CD Sagar Auditorium		
6.	Resource Person 1 Details** (Profile to be enclosed)	Mr.Glenn Roger Carr, Promoter and Chief Trainer at FINMARK		
7.	Topics Covered	CSIS Financial Planning and Research in Wealth Management Sector		
8.	Resource Person 2 Details** (Profile to be enclosed)	NA		
9.	Topics Covered	Prospects of Indian Stock Markets, financial planning basics, introduction to wealth management and its essentials		
10.	No. Faculty Participants (Enclose a copy of names with signatures)	Internal: 20		External: Nil
11.	No. Student Participants (Enclose a copy of names with signatures)	Internal:165		External: Nil
12.	Faculty Coordinator/s	Dr. Sumera Aluru		
13.	Student Coordinator/s	Sneha Lokur, Chandan C.S, Vineet S		
14.	Total Expenditure (Details to be enclosed)	NA		
15.	Sponsors and Amount (if any)	NA		
16.	Agenda of the Event (Enclose a copy)	NA		
17.	Report uploaded on college website? If yes, give details:			
18.	Report sent to media? If yes, give details:	NIL		
19.	Report uploaded in Social Media? If yes, give details:			

Sl. No.	Particulars	Event related Details
20.	Certificates Printed? (Enclose a copy***)	-
21.	Feedback Collected? (Enclose a copy***)	-
22.	Summary of the Event (Minimum 100 words)	The session started with discussion regarding the lucrative nature of financial markets in India and the power of compounding. Financial Planning is an essential skills for each individual who earns money. The speaker was instrumental in providing the basics tenants of financial planning. The later part of the session was handling to explain the fundamental concepts of wealth management, followed by scope and benefits of research in wealth management domain. To some extent the contemporary developments in this area were also pondered upon. Both the faculty members as well as the students got largely benefitted from the insights provided by the speaker. There were many leading inputs provided for the student and faculty research.
23.	Photographs of the Event (At least 10 relevant, clear, and appropriate photos with title and explanation. The jpg files need to be attached)	Photographs attached

Notes:

* Seminar / Workshop / Symposium / Conference / Cultural Fest / Quiz / Sports / Literature Fest, etc.

** Name / Organization / Designation / Area of Expertise

*** Format Copy need to be attached and hard copy need to be filed

PS: Whichever column is not applicable, write as NA.

Jumera
Event Coordinator

[Signature]
Cell-Head

A. Gnanu
29/08/23
IQAC Coordinator

Venkalath
HOD/Director
Principal

DAYANANDASAGAR COLLEGE OF ARTS SCIENCE AND COMMERCE

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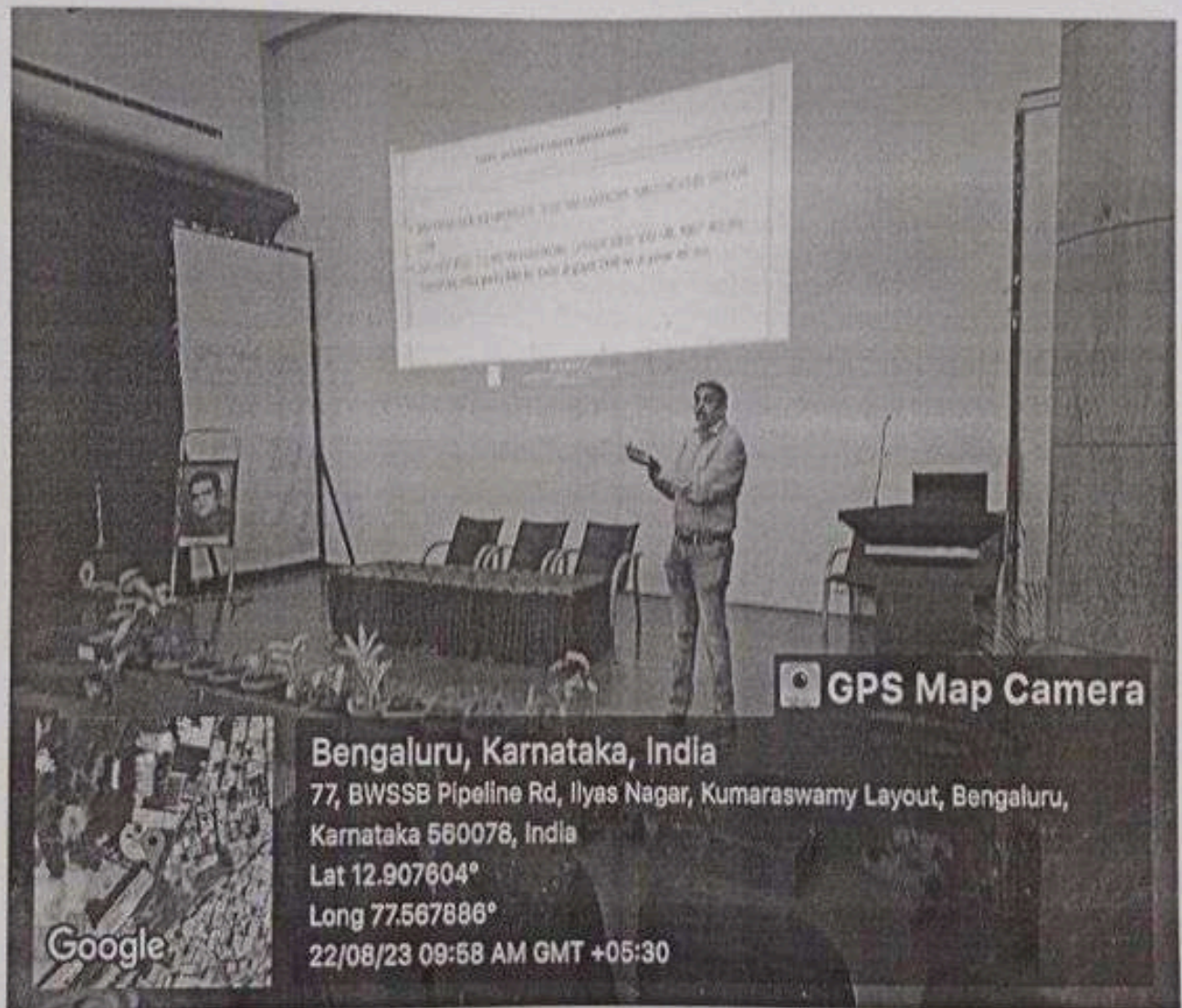
Department of Management Studies

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Mr. Glenn Roger, Finmark Trainers Pvt Ltd.,- delivering the lecture at CD Sagar Auditorium



Student Participants in the Expert Lecture by Mr.Glenn Rogerr, Finmark Trainers Pvt Ltd.,

Department of Management Studies

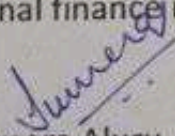
Date: 21st Aug 2023

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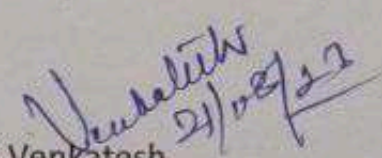
The department of management studies (MBA-BU) will be organizing an "Expert Lecture on CISI Financial Planning and Research in Wealth Management" by Mr. Glen Roger Carr Co- Founder and Director Finmark Trainers on **22nd August 2023 at 9.30 AM at CD Sagar Auditorium**. The expert lecture will bring the valuable insights for discussion –

- Setting financial goals and designing strategies to achieve those goals.
- Helping clients maximize their overall wealth.
- Helping clients maintain their wealth.
- Managing their investments and finances.
- Reducing the tax impact of wealth building.
- CISI Financial Planning
- CISI Certification Programs

All the students of II Sem –MBA-BU, are required to attend this expert lecture. The faculty members and staff can also utilise this opportunity to enhance personal finance management skills.


Dr. Sumera Aluru

Faculty Coordinator


Dr. B.R. Venkatesh

Director, MBA-BU

Dayananda Sagar College of Arts, Science & Commerce

Department of MBA - BU

Expert Lecture on CISI Financial Planning & Wealth Management

22.08.2023


Morning Session

Sec 'A'

Sl.no		Names	Signature
1	2022M002	ADITI DEWANGAN	<i>Adewangan</i>
2	2022P001	ADITI MANSUR	<i>Adi - P.M</i>
3	2022M005	AKASH VP	<i>Akad</i>
4	2022M007	AMITH TGM	<i>Amith TGM</i>
5	2022M008	ANIKET ASHWIN KAMAT	<i>Aniket Ashwin Kamat</i>
6	2022M010	ASHLESHA KUMARI	<i>Absent</i>
7	2022M012	AYUSH	<i>Absent</i>
8	2022M016	BM MEGHANA	
9	2022P004	CHANDAN CS	<i>Chandan CS</i>
10	2022M017	CHINMAYE P	<i>Chinmaye P</i>
11	2022P007	DEEPIKA K	<i>Deepika K</i>
12	2022M018	DEEPTHI V	<i>Deepthi V</i>
13	2022M020	DIVYA G	<i>Divya G</i>
14	2022M023	GULAM ABDUL KADIR	<i>Absent</i>
15	2022M028	JOSHIKA DK	<i>Joshika DK</i>
16	2022P011	JYOTHISH KUMAR S	<i>Jyothish Kumar S</i>
17	2022M030	KARTHIK M RAO	<i>Karthik M Rao</i>
18	2022M032	KIRAN PATEL ED	<i>Kiran Patel ED</i>
19	2022M035	MAHESH	<i>Mahesh</i>
20	2022M037	MEGHANA UMESH HEGDE	<i>Meghana Umesh Hegde</i>
21	2022M038	MOHAMMED JASEEM P	<i>Mohammed Jaseem P</i>
22	2022P016	NAMRATHA MP	<i>Namratha MP</i>
23	2022M044	NIHAL SAGAR GOWDA	<i>Nihal Sagar Gowda</i>
24	2022P018	POONAM PONNAMMA KV	<i>Poonam Ponnamma KV</i>
25	2022P020	PUSHPALATHA M	<i>Pushpalatha M</i>
26	2022M049	RAHUL M	<i>Rahul M</i>
27	2022P021	RAHUL TILAK	<i>Rahul Tilak</i>
28	2022M052	RASHATH HS	<i>Rashath HS</i>
29	2022M053	RISHI NANDA B S	<i>Rishi Nanda B S</i>
30	2022M055	ROHITH DEVRAKONDA	<i>Rohith Devrakonda</i>
31	2022P025	SAHANA J	<i>Sahana J</i>
32	2022M058	SAHEL SALAM KC	<i>Sahel Salam KC</i>
33	2022M060	SAI SUJITH R	<i>Sai Sujith R</i>
34	2022M061	SAKSHI SATYANARAYANA GOWDA	<i>Sakshi Satyanarayana Gowda</i>
35	2022P028	SANKETH	<i>Sanketh</i>
36	2022M069	SHARADVI KS	<i>Sharadvi KS</i>

Sumera

37	2022P032	SPOORTHY HS	Spoorthy H.S.
38	2022M077	SRI LAKSHMI KS	Sri Lakshmi K.S.
39	2022P036	SYED ISRAR	Syed Israr
40	2022M081	TARIQ AZIZ LASKAR	Tariq Aziz Laskar
41	2022M082	TEJASKARA NS	Tejaskara N.S.
42	2022M084	VAISHNAVI G	Vaishnavi G.
43	2022M086	VARUN KUMAR	- Absent -
44	2022M094	VISHAL RANJAN	Vishal Ranjan
45	2022M098	KAMALESH A	Kamalesh A.
46	2022P044	SHIRHARSHA K MALAVADE	Shirharsha K Malavade
47	2022P047	MARSHEL J FERNANDES	Marshel J Fernandes
48	2022P050	BASAYYA S	Basayya S.
49	2022P054	VIJAY K MANDRE	Vijay K Mandre
50	2022P057	VINEET UDAY SHANBHAG	Vineet Uday Shanbhag
51	2022P062	RAKESH SHARMA NS	Rakesh Sharma N.S.
52	2022P065	DEVIKA R	Devika R
53	2022P070	SAMRAT SP	Samrat S.P.
54	2022P072	DUSHYANTH V GOWDA	Dushyanth V Gowda
55	2022P075	RAKESH M	Rakesh M
56	2022P077	RUTWIK HONAWAD	Rutwik Honawad
57	2022P080	RUTIKA U MANGALE	Rutika U Mangale
58	2022P082	KUSHWANTH KUMAR L	- Absent -
59	2022M103	ANJAN KRISHNA AS	Anjan Krishna A.S.
60	2022M104	LAKSHMINARAYANA CHOWDARY	Lakshminarayana Chowdary


 [DR. SUMERA]
 Faculty Coordinator

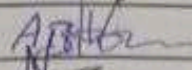


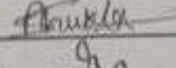





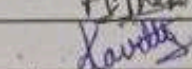
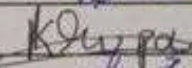
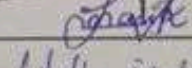
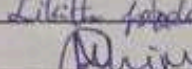
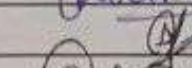

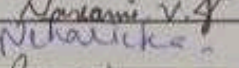



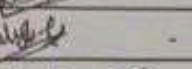

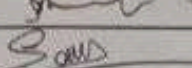


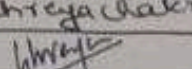
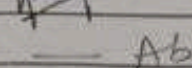
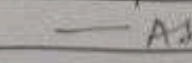
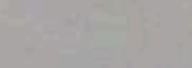
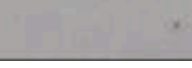
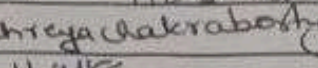
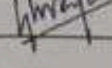
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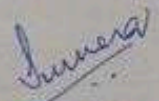
Morning Session

Sec 'B'

Sl.no		Names	Signature
1	2022M004	AJITH KUMAR	
2	2022M006	AMAN SAMEER	
3	2022M011	ASWATHI P NAIR	
4	2022M013	AYUSHI SHUKLA	
5	2022P003	BEVANTH E SINGH	
6	2022M015	BHAKTI S SHIRODKAR	
7	2022P006	DARSHAN NAGAPATI HEGDE	
8	2022M021	GAGAN	
9	2022M022	GUGGILLA VENKATA TEJA	
10	2022M024	HARSHA M	
11	2022P009	HITHESH SS	
12	2022M031	KAVITHA K.	
13	2022M033	KRUPAKAR R GOWDA	
14	2022P013	LAHARI KM	
15	2022M034	LIKITHA M JALADANKI	
16	2022M036	MAHIMA DEVI	
17	2022P015	MOHAMMED ARFAZ	
18	2022M040	NAMRATA HANAMANTHGOUDA	
19	2022P017	NAVAMI VJ	
20	2022M042	NEHARICKA SUBBA	
21	2022M043	NEVIL KANIK	
22	2022M046	PANKUSH DILIP JAIN	
23	2022P005	PREETHI CK	
24	2022P022	RAJENDRA GANAPATI NAIK	
25	2022M051	RAKSHA HG	
26	2022M054	ROHAN PIUS	
27	2022M062	SAKTHI SUNDARAM R	
28	2022P026	SAMPRITHA R SHETTY	
29	2022M064	SANGAMESH BAGEWADI	
30	2022M070	SHARAN M	— Absent —
31	2022M074	SHREYA CHAKRABORTY	
32	2022M075	SHREYA TP	
33	2022M076	SOMPALLI CHAITANYA	— Absent —
34	2022P030	SOUBHAGYA SINGRI	— Absent —

Jumey

35	2022P034	SUKRUTH HEBBAR GR	Sukruth G.R.
36	2022M078	SUNITHA VH	Sunitha V.H.
37	2022P037	TEJASHWINI N	Tejaswini
38	2022P038	TEJASWINI M	
39	2022M083	UDAYAGIRI SIVA CHARAN SUBRAMANYAM	Uday
40	2022M085	VAMSHI KRISHNA	Vamsi...
41	2022M087	VARUNKUMAR N	Varun
42	2022P040	VIDYANANDA C HEGDE	Vidyananda C. Hegde
43	2022M091	VINITHA M	Vinitha
44	2022M093	VISHAL M KOCHREKAR	Vishal
45	2022P041	VISHWAS BARKER	Vishwas
46	2022M095	YELLAMPATI PUNYAMURTHY	Y. Punyamurthy
47	2022M097	YUKESH R	Yukesh
48	2022P045	BHAIRAVAGIRI MN.	Bhairavagiri
49	2022P048	DIVYA BS	Divya
50	2022P051	RAVUTAPPA MALAGHAN	Ravutappa
51	2022P053	VAISHNAVI G	
52	2022P055	SURYA KIRAN K	Surya Kiran
53	2022P059	AMRUTHA K	Amrutha
54	2022P060	SHRAVANI K	Shravani
55	2022P063	ABHAY SURYA B	Abhay S.B.
56	2022P066	DEEPAK DS	Deepak D.S.
57	2022P061	AISHWARYA GUPTA V	V. Aishwarya Gupta
58	2022P068	AADITHYA S	Aadithya
59	2022P076	MANOHAR GM	Manohar G.M.
60	2022P078	AYYAPAYYA SWAMI	Ayyappa
61	2022P081	SNEHA LOKUR	Sneha


 [Dr. SUMERA]
 Faculty Coordinator

Dayananda Sagar College of Arts, Science & Commerce
Department of MBA-BU

Expert Lecture on CISI Financial Planning & Wealth Management

22.08.2023

Morning Session

Sec 'C'

Sl.no		Names	Signature
1	2022M001	AAGHASH R	
2	2022M003	AISHIK ROY CHOUDHURY	
3	2022P002	AKSHAY A NAIK	
4	2022P012	ARSHIYANAZ KB	K.B. Arshiyana
5	2022M014	BASAVARAJESHWARI R ABBIGERI	
6	2022M019	DEVADARSH SUNIL	
7	2022P008	DUSHYANTH MC	Dushyanth M.C.
8	2022M025	HARSHITHA MP	
9	2022P010	JEEVITHA HS	Jeevitha H.S.
10	2022M029	JUNEDSHIRAHATTI	
11	2022P014	MANASI DEEPAK CHIKORDE	
12	2022M039	MOKESHWAR S	
13	2022M041	NARAYAN S VINOD	
14	2022M045	NISCHITA MANJUNATH HONAKERI	
15	2022M047	PRADEEP VARMA DANDU	
16	2022P019	PURUSHOTHAM N	
17	2022M050	RAHUL RAJ	
18	2022P023	RASHMI S KULKARNI	
19	2022M057	SACHIN K N	
20	2022P024	SACHIN RAJ	
21	2022M063	SAMEERA BHARADWAJ KS	
22	2022M065	SANJANA BK	
23	2022P027	SANJAY SAJJAN	
24	2022M067	SHAKEEL AKTHAR AV	
25	2022M068	SHALINI P	
26	2022M071	SHARANYA R VASISHTA	
27	2022M072	SHARATH KALKUNTE	
28	2022P029	SNEHA R	
29	2022P031	SOWMITHRA R	
30	2022P033	SUHAS MS	
31	2022M079	SURAJ RK	— Absent —
32	2022P035	SURAJ S KOTHARI	— Absent —
33	2022M080	TANYA SINGH	
34	2022P039	TRUPTHI RAVISHANKAR	

35	2022M088	VEERASEKHAR REDDY D	<u>Veer</u>
36	2022M089	VEMULASOWMYA	<u>Sowmya</u>
37	2022M090	VIJAYA MADHAVAN.S	<u>Vijaya</u>
38	2022M092	VISHAL M	<u>Absent</u>
39	2022P042	VIVEK J	<u>Vivek J</u>
40	2022M096	YUGENDHAR B	<u>Yugendhar B</u>
41	2022P043	ARUN HN	<u>Absent</u>
42	2022P046	DEEPIKA N	<u>Deepika N</u>
43	2022P049	ADITYA UDAYKUMAR MADIVAL	<u>Aditya</u>
44	2022P052	RAMAKRISHNA SHRIPAD HEGDE	<u>Rth</u>
45	2022P056	KARTHIK P	<u>Karthik P</u>
46	2022P058	VARUN GOVIL K	<u>K. Varun</u>
47	2022P064	MANJUNATH	<u>Manjunath</u>
48	2022P067	SHASHANK HG	<u>Shashank H.G.</u>
49	2022P074	SURESH R	<u>Suresh</u>
50	2022P069	ABHIRAM MV	<u>Abhir</u>
51	2022P071	UDAY GOWDA N	<u>Uday</u>
52	2022P073	SURYA MARKANDEYA BAGUR	<u>Surya</u>
53	2022P079	MUBERREZ BAIG	<u>Muberriz Baig</u>
54	2022M099	KAVYASHREE R	<u>Kavyashree</u>
55	2022P083	LALITHA B	<u>Lalitha</u>
56	2022M100	SHANTVEER HAVERI	<u>Shantveer</u>
57	2022M048	PRIYA MS	<u>PRIYA</u>
58	2022M101	NIKHIL GOPALKRISHNA NAIK	<u>Nikhil</u>
59	2022M102	SHREYAS NAGARAJ RAO KULKARNI	<u>Shreyas</u>

Sumera
 DR. SUMERA
 [Faculty Coordinator]