



IPFP Summit 2023

India Personal Finance Professionals

12th Annual Conference | January 19-20-21

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Qualified
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DAY 1

Exposition & InnoVision

January 19th, Thursday



#NFP2023










InnoVision & Exposition (Track 1)

Grow Practice Faster, Serve Clients Better



IPFP Summit 2023
India Personal Finance Professionals

Date: January 19, 2023 | Time: 09:00 am to 7:00 pm | Venue: Majestic Ballroom, Lalit Hotel

Time	Sessions		Organization	Category
09:00 am 09:30 am	Debt Funds vs P2P products - How to differentiate?		Nirmal Revaria CBO, LenDenClub	P2P Platform
09:30 am 10:00 am	Maximise the Value of Your Business		P L Natarajan CEO, Happyness Factory	A & D Platform
10:00 am 10:30 am	How to Create an AI based stock portfolio?		Sumit Chanda Founder & CEO, Jarvis Invest	Stock Portfolio Platform
10:30 am 11:00 am	Be ready for, what your client want in the next decade!		Bhanu Tomar Zonal Head	A & D Platform
11:00 am 11:30 am	Tea Break & Networking			
11:30 am 12:00 pm	The 3Rs in P2P products-Risk, Return & Regulations		Mukesh Bubna Founder & CEO, Monexo	P2P platform
12:00 pm 12:30 pm	Domestic opportunities amid global headwinds		Amit Gupta Fund Manager - PMS, ICICI Securities	A & D Platform
12:30 pm 01:00 pm	Diversify your portfolio with global investing strategies		Raj Gandhi Co-founder, DollarBull	International Investing
01:00 pm 01:30 pm	Become a one-stop CFO for your HNI clients!		Manu Awasthy Founder & CEO, Centricity	A & D Platform
01:30 pm 02:30 pm	Lunch & Networking			
02:30 pm 03:00 pm	P2P - Global markets & acceptance in India		Rajat Gandhi Founder & CEO, Faircent	P2P Platform
03:00 pm 03:30 pm	Changing landscape of personal finance advisory in India.		Keval Bhanushali Co-founder & CEO, 1 Finance	A & D Platform
03:30 pm 04:00 pm	3 ways to bring down your operation cost		Chetan Doshi Vice President, NSE NMF II	Transaction Platfor
04:00 pm 04:30 pm	5 Ways to give a WOW client experience!		Aditya Agarwal Founder, Wealthy	A & D Platform
04:30 pm 05:00 am	Tea Break & Networking			
05:00 pm 05:30 pm	How to select the right P2P Platform?		Gautam Adukia Co-founder, Liquiloans	P2P Platform
05:30 pm 06:00 pm	Succession planning for IFAs		Vishranath Suresh Co-founder, Asset Plus	A & D Platform
06:00 pm 06:30 pm	Become an insurance CFO for all your clients		Navvin Jain Chief Business Officer, TurtleMint	Insurance Platform
06:30 pm 07:00 pm	India Startup Revolution - How you can be a part of it?		Ajay Modi Vice President, Piper Serica	Portfolio Managemen Services

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09:00 am 09:30 am	Plan for children's education abroad with global investments		Prashant Ajmera Founder, Ajmera Law Group	Immigration Investment
09:30 am 10:00 am	Build an effective client communication strategy		Parag Kasliwal CEO & Co-founder, Beyond IRR	Business Development
10:00 am 10:30 am	Global Market Outlook 2023		Dhaval Kapadia Director Managed Portfolios, Morningstar	Research Solutions
10:30 am 11:00 am	The SMA way to attain, retain and upsell the HNIs		Ameet S Kishorpuria Business Head & Co-founder, SMA, Narnolia	PMS & Advisory Solutions
11:00 am 11:30 am	Tea Break & Networking			
11:30 am 12:00 pm	Stop unplanned redemptions and retain AUM		C R Chandrasekar Founder & CEO	Loan against MF
12:00 pm 12:30 pm	Diversify your portfolio beyond Mutual Funds		Bhavik Thakkar CEO, Abans Investment	Alternate Investments
12:30 pm 01:00 pm	Are you tapping the 4Ms to scale your practice?		Anuraag Saboo Co-founder, Fund Expert	A & D Software
01:00 pm 01:30 pm	5 Ways to scale your practice with automated services		Zahiruddin Babar CEO & Co-founder, REDVision	A & D Platform
01:30 pm 02:30 pm	Lunch & Networking			
02:30 pm 03:00 pm	Pivoting from Transaction-based model to Relationship-based mode		Sonesh Dedhia Co-founder, IFANOW	A & D Platform
03:00 pm 03:30 pm	Increase your conversion with digital marketing		Jigar Parekh Founder & CEO, Anchor Edge	Digital Marketing
03:30 pm 04:00 pm	Personal finance from a Techie's perspective		Ameet Ayare Co-founder & CEO, Actlogica	A & D Software
04:00 pm 04:30 pm	The next big opportunity in alternate debt solutions		Vineet Agarwal Co-founder, Jiraaf	Alternate Debt
04:30 pm 05:00 am	Tea Break & Networking			
05:00 pm 05:30 pm	3 ways to avoid losing money in your business		Sunil Jain CEO & Founder, Investwell	Investwell
05:30 pm 06:00 pm	5 Effective MF research calculators for your practice		Pradip Chakrabarty Founder & CEO, Advisor Khoj	Research Tools
06:00 pm 06:30 pm	Are you part of the next big shift to AIF & PMS ?		Daniel GM Founder & Director, PMS Bazaar	IPMS & AIF

DAY 2

FundManager & PFP SuccesTalks

January 20th, Friday



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FundManager OpenTalks (Left Ballroom)

India's Golden Decade - 11 Investment Trends to Watch Out!



IPFP Summit 2023
India Personal Finance Professionals

Date: January 20, 2023 | Time: 09:00 am to 6:30 pm | Venue: Majestic Ballroom, The Lalit Hotel

Time	Sessions	Speaker Name	Organization	Moderator
08:30 am 09:00 am	Breakfast & Registration			
09:00 am 09:40 am	India's Golden Decade - For you & your clients	Aashish Sommaiya	Chief Executive Officer, Whiteoak Capital AMC,	Pramod Saraf Director, Swan Finance
09:40 am 10:20 am	Passive Investing - Thinking beyond expense ratios	R Srinivasan	CIO - Equities, SBI MF	Harsh Roongta FeeOnly IA
10:20 am 11:11 am	Debt MF - Replacement for India's love i.e. FDs	Manish Bhantia	Deputy.CIO-Fixed Income, ICICI Pru AMC	Kirtan Shah Credence
11:00 am 11:30 am	Tea Break & Networking			
11:30 am 12:10 pm	The Rise Of PFPs - India and World	Ajit Menon	CEO, PGIM India MF	Mukesh Jindal Alpha Capital
12:10 pm 12:50 pm	Risk Management - The biggest blindspot	Sailesh Raj Bhan	Deputy CIO - Equity Nippon India MF	Meghashyam Sinkar Pentagraph
12:50 pm 01:30 pm	International Investing - Tapping the 97% Global GDP	Mahesh Patil	Chief Investment Officer, Aditya Birla Sun Life AMC	Vishal Dhawan Plan Ahead
01:30 pm 02:30 pm	Lunch & Networking			
02:30 pm 03:10 pm	Fixed Income - Tap the untapped potential	Devang Shah	Co-head - Fixed Income, Axis MF	Nikhil Kothari Etica Wealth
03:10 pm 03:50 pm	Bond Markets - Is India ready for the FI wave?	Amandeep Singh Chopra	Head - Fixed Income, UTI MF	Puneet Agarwal Banyan
03:50 pm 04:20 pm	Tea Break & Networking			
04:20 pm 05:00 pm	Goal Based Funds - Bring focus to client's investment	Rahul Singh	CIO - Equities, Tata AMC	Sujata Kabraji Scripbox
05:00 pm 05:40 pm	Behaviour Management> Investment Management	Chirag Setalvad	Head - Equities, HDFC AMC	Anand Rathi Augment Capital
05:40 pm 06:20 pm	Timeless Strategies - Golden Rules which will never rust	Harsha Upadhyaya	CIO - Equity & Debt, Kotak MF	Vivek Shah Finrise

PFP SuccessTalks (Right Ballroom)

The Making of a Successful Personal Finance Professional (PFP)



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Time	Sessions	Moderator	Speaker 1	Speaker 2	Speaker 3
08:30 am 09:00 am	Breakfast & Registration				
09:00 am 09:40 am	Foundation You	Raghav Iyengar Axis Mutual Fund	Gajendra Kothari Etica Wealth	Nandish Desai JagoInvestor	Srikanth Matrubai SriKavi
09:40 am 10:20 am	Financial Solutions	Sandeep Sharma SBI Mutual Fund	Saravanan S Purplepond	Lakshmipathi Yelam My Financial Pages	Charmi Shah Torient Services
10:20 am 11:00 am	Financial Products	Amar Shah ICICI Prudential MF	Kavitha Menon Probitus Wealth	Khyati Mashru Plantrich Consultancy	Nikhil Karnik W2D Finverse
11:00 am 11:30 am	Tea Break & Networking				
11:30 am 12:10 pm	Client Acquisition	Manish Thakkar Aditya Birla MF	Prabin Agarwal Prabin Agarwal	Puneet Oberoi Finwise	Anant Ladha Invest Aaj for Kal
12:10 pm 12:50 pm	Client Servicing	Saugata Chatterjee Nippon India MF	Shalini Dhawan Plan Ahead	Neeraj Chauhan The Financial Mall	Rohit Shah Getting You Rich
12:50 pm 01:30 pm	Client Retention	Ashok Kanawala HDFC AMC	Shailendra Kumar FinAtoZ.com	Suresh Sadagopan Ladder7	Deepali Sen Srujan Financial Services
01:30 pm 02:30 pm	Lunch & Networking Break				
02:30 pm 03:10 pm	Systems & Processes	Prateek Pant WhiteOak Capital AMC	Hemant Rustagi Wise Invest	Dilshad Billimoria Dilzer Consultants	Chetan Chandaliya Crown Advisors
03:10 pm 03:50 pm	Tools & Technology	Abhishek Tiwari PGIM India MF	Rajeshwar Reddy Ventura Suceder	Viral Bhatt Money Mantra	Hitesh Kakkad Moneyplus Financial
03:50 pm 04:20 pm	Tea Break & Networking				
04:20 pm 05:00 pm	Team Management	Manish Mehta Kotak MF	Lovaii Navlakhi IMMPL	Nitin Sawant N S Wealth Solutions	Srikanth Bhagavat Hexagon Wealth
05:00 pm 05:40 pm	Succession & Collaboration	Hemant Kumar Tata MF	Bharat Phatak Scripbox	Bhavesh Bhatt Ghalla Bhansali	Balvir Chawla Finnovators
05:40 pm 06:20 pm	Regulations & Compliance	Peshotan Dastoor UTI AMC	Kalpesh Ashar Full Circle	Uday Dhoot VennWealth.in	Dhruv Mehta Sapient Wealth

DAY 3

Financial Well Being Conclave & Ignite Talks by IAP Champions

January 21st, Saturday



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11 Strangest Secrets of Wealth Creation for Indians

Date: January 21, 2023 | Time: 09:00 am to 6:00 pm | Venue: Majestic Ballroom, Lalit Hotel

Time	Sessions	Teaser Name	Speaker, Organization
09:00 am 09:50 am	Breakfast & Registration		
09:45 am 10:15 am	INFP Members Welcome and Introduction		Col.Sanjeev Govila (Retd) Chair, IPFP Summit 2023
10:15 am 10:30 am	Investors Welcome and introduction		Sadique Neelgund Founder, Network FP
10:30 am 10:45 am	Secret 11 - Ride the India Growth Story	Godfather of Wealth	Navneet Munot MD & CEO, HDFC MF
10:45 am 11:00 am	Secret 10 - Attach Financial Goals to Investments	Goal-keeper of Wealth	Sundeep Sikka ED & CEO, Nippon India MF
11:00 am 11:15 am	Secret 09 - Involve Women in Family Finances	Super-power of Wealth	Radhika Gupta MD & CEO, Edelweiss AMC
11:15 am 11:30 am	Secret 08 - Invest regularly with SIPs	Simplifier of Wealth	Aashish Sommaiya ED & CEO, WhiteOak MF
11:30 am 11:45 am	Secret 07 - Keep Increasing Investment Amounts	Booster of Wealth	Chandresh Nigam MD & CEO, Axis MF
11:45 am 12:00 pm	Secret 06 - Participate in India Equity Markets	Multiplier of Wealth	Kailash Kulkarni Co-CEO, HSBC MF
12:00 pm 12:15 pm	Secret 05 - Participate in Debt for Portfolio Optimization	Defender of Wealth	D P Singh Deputy MD , SBI MF
12:15 pm 12:30 pm	Secret 04 - Mind Your Behaviour	Commander of Wealth	Kalpen Parekh MD & CEO, DSP MF
12:30 pm 12:45 pm	Secret 03 - Diversify to Minimize Risk & Maximize Returns	Protector of Wealth	Prathit Bhoje MD & CEO, Tata MF
12:45 pm 01:00 pm	Secret 02 - Achieve Financial Freedom & Enjoy your Wealth	Motivator of Wealth	Ajit Menon CEO, PGIM MF
01:00 pm 01:15 pm	Secret 01 - Take help of a Professional	Well-wisher of Wealth	A Balasubramanian MD & CEO, ABSL AMC
01:15 pm 01:30 pm	Next steps, delegate gifts and action points		

IAP Community Champions

9 Strategies for Becoming IAP Community Champion

network **FP**
Financial Planning

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India Personal Finance Professionals

Date: January 21, 2023 | Time: 09:00 am to 6:00 pm | Venue: Majestic Ballroom, The Lalit Hotel

Time	Sessions	Speaker	Organization
01:30 am 02:30 am	Lunch & Networking Break		
02:30 pm 02:40 pm	Introduction to IAP Community Champions + Community Activity		
02:40 pm 02:50 pm	Strategy 1 - Position yourself as an expert	Col. Sanjeev Govila(retd)	Hum Fauji Initiatives
02:50 pm 03:00 pm	Strategy 2 - Get IAP opportunities regularly	Nitesh Buddhadev	Nimit Consultancy
03:00 pm 03:10 pm	Strategy 3 - Develop program people will love	Aloke Vohra	Probus Insurance
03:10 pm 03:20 pm	Strategy 4 - Build stage presence & confidence	Jigar Parekh	AnchorEdge
03:20 pm 03:30 pm	Community Activity		
03:30 pm 04:00 pm	Tea & Networking Break		
04:00 pm 04:10 pm	Strategy 5 - Engage audience with stories & visuals	Gajendra Kothari	Etica Wealth
04:10 pm 04:20 pm	Strategy 6 - Customise your content for audience	Harshvardhan Roongta	Roongta Securities
04:20 pm 04:30 pm	Strategy 7 - Choose your mode & format of delivery	Nisha Sanghavi	ProMore Fintech
04:30 pm 04:40 pm	Strategy 8 - Have an action plan for attendees	Puneet Oberoi	Finwise Services
04:40 pm 04:50 pm	Strategy 9 - Avoid the common IAP mistakes	Amit Trivedi	Author & PFP Trainer
04:50 pm 05:00 pm	Launch of IAP Resources for NFP ProMembers	Sadique Neelgund	Network FP
05:00 pm 05:30 pm	Closing Ceremony - IPFP Summit 2023		



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