

10th India Wealth Management Conference

29 AUGUST 2025 | MUMBAI

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Workshop Agenda | 29 August 2025

8:30 AM - 9:30 AM	Networking			
8:30 AM - 9:30 AM	Registration for Workshops 1 & 2 (or all workshops)		206 A & B	
	Workshop 1a	206 A	Workshop 1b	206 B
9:30 AM			Impact by Design : A Workshop on Evidence-Based Capital Allocation in Philanthropy	
10:00 AM - 11:30 AM	Manager Selection (Mercer)			
	<p>Hem Kishore Wealth Investments Leader, Mercer Global Service Delivery</p> <p>Akshay Dua Director, Investments, Mercer Global Service Delivery</p> <p>Moderator Chanchal Agarwal, CFA CIO – Credence Family Office</p>			
11:30 AM - 12:00 PM	Networking Break with snacks post Workshops 1a/1b			
	Workshop 2a	206 A	Workshop 2b	206 B
12:00 PM - 2:00 PM	Risk Profiling & Suitability		Wealth Architecture: Frameworks for Intelligent Wealth Structuring	
	<p>Paul Resnik Founder, PlanPrompt</p>		<p>Bijal Ajinkya Partner, Khaitan & Co.</p> <p>Anushka Venketram Senior Associate, Khaitan & Co.</p>	
2:00 PM - 2:30 PM	Networking Lunch Break for Workshop Delegates			Pre function area

Conference Agenda | 29 August 2025

2:30 PM - 3:00 PM	Registrations		
	Conference Chairs		Lotus (section 1)
	Shamit Chokshi, CFA Board Director & Chairperson, Professional Learning Committee, CFA Society India	Vijayanand Venkataraman, CFA Board Director & Co-Chairperson, Professional Learning, CFA Society India	
3:00 PM - 3:10 PM	Conference Hosts		Lotus (section 1)
	Kunal Agarwal, CFA Volunteer, CFA Society India	Jugal Harpalani, CFA Volunteer, CFA Society India	
3:10 PM - 3:30 PM	Conference Opening Remarks (CFA Institute India)		Lotus (section 1)
	Arati Porwal Country Head, CFA Institue India		
3:10 PM - 3:30 PM	Conference Opening Remarks (CFA Society India)		Lotus (section 1)
	Vijayanand Venkataraman, CFA Board Director & Co-Chairperson, Professional Learning, CFA Society India		
3:30 PM - 4:30 PM	Building your Portfolio – Practical Considerations		Lotus (section 1)
	Rajesh Adwalpalker, CFA MD & Head of Investment Lab, Asia Citi Private Bank	Moderator Shamit Chokshi, CFA Board Director & Chairperson, Professional Learning Committee, CFA Society India	
4:30 PM - 5:30 PM	Learning from the Legacy: What Family Offices Reveal About Building Enduring Wealth		Lotus (section 1)
	Abhishek Khandelwal CFO, Snow Leopard Ventures	Natasha Adnani, CFA VP, Investments, Nadathur Estates	Moderator Aanchal Almal, CFA Volunteer, CFA Society India
5:30 PM - 5:55 PM	Networking + Tea Break		Pre-function area
5:55 PM - 6:00 PM	20 Years of Indian Association of Investment Professionals		Lotus (section 1)
	Rajesh Sehgal, CFA Chairperson, CFA Society India		
6:00 PM - 7:00 PM	Reimagining Wealth Management		Lotus (section 1)
	Marc Pilgrem MD & CEO, JioBlackRock Investment Advisers	Satish Betadpur, CFA Volunteer, CFA Society India	
7:00 PM - 8:00 PM	Balancing Trust & Growth: The CEO Playbook for Private Banking		Lotus (section 1)
	Atul Singh CEO and MD, LGT Wealth India	Vipul Kapur Head of Mashreq Private Banking, Mashreq	Moderator Apurva Sahijwani MD & CEO, Avendus Wealth Management
8:00 PM - 8:05 PM	Conference Closing Remarks (CFA Society India)		
	Shamit Chokshi, CFA Board Director & Chairperson, Professional Learning Committee, CFA Society India		
8:05 PM Onwards	Networking + Dinner		