

**Office of the
Public Relations Officer-
Media Coordinator
Jamia Millia Islamia**

October 26, 2018

Press Release

Workshop on Tax Planning and Wealth Management Strategies at JMI

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Department of Commerce and Business Studies, Jamia Millia Islamia (JMI) organized a workshop on 'Tax Planning and Wealth Management Strategies' on 24th October, 2018 at FTK- CIT Seminar Hall. Mr. A.P. Siddiqui (I.P.S.), Registrar, Jamia Millia Islamia, in his inaugural address emphasized the need of creating awareness about the tax planning and wealth management aspects and appreciated the concept of the workshop to facilitate the Industry – academia interface. This workshop was organised in collaboration with 'The Policy Times'.

The workshop was divided into two sessions. The first session was focused on *Tax Planning*, chaired by Prof. Ravinder Kumar, Head, Department of Commerce and Business Studies, JMI and the second session was on *Wealth Management Strategies*, chaired by Dr. Naseeb Ahmad, Associate Professor, Department of Commerce and Business Studies, JMI.

The panelists for both the sessions consisted of seven experts from the Financial services and Asset/ Wealth Management industry. The session on tax planning deliberated on various methods to ethically and smartly save money by reducing the tax liability. Prof. Kumar, after briefly discussing the concept, objectives and devices of personal tax planning, highlighted some key benefits extended to salaried class and senior citizens by the Government in the last two years through the Finance Bills of 2018 and 2017. The panelist, C.A. Pankaj Sharma (F.C.A., Sampark and Associates) explained how the various deductions, allowances and other salary benefits can be used to save taxes. Mr. M.S. Shabir (Promoter and Managing Director, Sen Sage) provided useful tips on tax saving. Mr. Nitin Srivastava (Chief Manager- L&D, Reliance Nippon Life Asset Management) shared the practical examples related to tax planning and management. He encouraged the participants to take advantage of the financial markets and exemptions provided by the Government.

The session of 'Wealth Management' was focused on managing money and creating wealth. Mr. Vikram Chhokar (Regional Head- North & East, Karvy Private Wealth) explained as to

how understanding the risk factors is important in investment. He further emphasized the importance of proper asset allocation.

Mr. Ganesh Jha (Area Head – Sales, Banking & P.C.G. – Delhi/Punjab, Tata Asset Management Ltd.) emphasized how disciplined investing at an early stage can lead to great benefits at later stages of life.

Ms. Dipanjana Gupta (Senior Consultant, Swiss Asia Asset Management) presented the Investment scenario in India and discussed the functioning of Hedge Funds and its strategies.

Mr. Sandeep Mathur, Regional Head, Tata Asset Management Ltd. shared the various options available to investors for wealth maximization. The sessions were followed by questions & answer round in which the participants raised key questions related to tax planning and wealth management.

Dr. Mohd. Atif, Assistant Professor, Department of Commerce and Business Studies, JMI presented the concluding remarks, and highlighted the key points of discussion. The workshop ended with a vote of thanks by Mr. Akram Hoque.

Ahmad Azeem
PRO-Media Coordinator
JMI



Department of Commerce & Business Studies
Jamia Millia Islamia, New Delhi



In Collaboration with
The Policy Times
Presents

Workshop

The Planning and Wealth Management Strategies

24 October 2018, 10:30 am - 2:00 pm
Venue: CIT HALL, Jamia Millia Islamia,
New Delhi

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