



**CHRIST
ACADEMY**

INSTITUTE FOR ADVANCED STUDIES

School of Business and Management

Mind The Gap

Corporate Talk Series



Mr. Roopam Goswami
Associate Asset and Wealth Management
J P Morgan Chase & Co



20th November 2021, 12:00PM-1:00 PM
1st Floor Seminar Hall

Am *Devs*



Sangeetha D <sangeethad@calas.in>

Fwd: Invitation to CAIAS

MBA Director CAIAS <director.mba@caias.in>
 To: Sangeetha D <sangeethad@calas.in>

Fri, May 6, 2022 at 10:23 AM

Be- New

Binu P Paul Ph.D

Director
 School of Business and Management
 Christ Academy Institute for Advanced Studies
 Begur Road
 Bengaluru

----- Forwarded message -----

From: MBA Director CAIAS <director.mba@caias.in>

Date: Tue, Nov 16, 2021 at 9:10 AM

Subject: Invitation to CAIAS

To: <roopam.goswami1990@gmail.com>

Cc: Anjali T V <anjalitv@caias.in>, Prasanna Venkatesh s <prasannav@caias.in>, Dr. Mohini Bhat <mohinib@calas.in>, Binu Paul <binuppaul@calas.in>

Dear Roopam,

I have great pleasure in inviting you to the School of Business and Management at CAIAS. It will be great to have you on campus for the corporate speaker series. The programme will be attended by MBA students and BBA final year students.

I am marking the mail to Prof. Anjali and Prof. Prasanna who are faculty coordinators for this initiative and also to Dr. Mohini who is the HoD for SBM.

Requesting you to kindly share a photo and a brief write up for introduction and to put in the website.

Thankyou very much in advance

Best
 Be- New

Binu P Paul Ph.D

Director
 School of Business and Management
 Christ Academy Institute for Advanced Studies
 Begur Road
 Bengaluru



24/03/2022, 13:15

Christ Academy Educational Institutions Mail - Invitation to CAIAS



Anjali T V <anjalitv@caias.in>

Invitation to CAIAS

5 messages

MBA Director CAIAS <director.mba@caias.in>

Tue, Nov 16, 2021 at 9:10 AM

To: roopam.goswami1990@gmail.com

Cc: Anjali T V <anjalitv@caias.in>, Prasanna Venkatesh s <prasannav@caias.in>, "Dr. Mohini Bhat" <mohinib@caias.in>, Binu Paul <binuppaul@caias.in>

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Best
Be- New

Binu P Paul Ph.D

Director
School of Business and Management
Christ Academy Institute for Advanced Studies
Begur Road
Bengaluru



Roopam Goswami <roopam.goswami1990@gmail.com>

Tue, Nov 16, 2021 at 9:15 AM

To: MBA Director CAIAS <director.mba@caias.in>

Cc: Anjali T V <anjalitv@caias.in>, Binu Paul <binuppaul@caias.in>, "Dr. Mohini Bhat" <mohinib@caias.in>, Prasanna Venkatesh s <prasannav@caias.in>

Dear Binu Sir,

Acknowledging receipt of the mail. Many thanks for the invite. Will share the photo/write up as advised.

Thanks,

Roopam

24/03/2022, 13:15

Christ Academy Educational Institutions Mail - Invitation to CAIAS

[Quoted text hidden]

Regards,

Roopam Goswami

MBA Director CAIAS <director.mba@caias.in>
To: Roopam Goswami <roopam.goswami1990@gmail.com>
Cc: Anjali T V <anjali tv@caias.in>, Binu Paul <binuppaul@caias.in>, "Dr. Mohini Bhat" <mohinib@caias.in>, Prasanna Venkatesh s <prasannav@caias.in>

Tue, Nov 16, 2021 at 9:37 AM

Thanks Roopam.

Best
Be- New

Binu P Paul Ph.D

Director
School of Business and Management
Christ Academy Institute for Advanced Studies
Begur Road
Bengaluru

[Quoted text hidden]



Roopam Goswami <roopam.goswami1990@gmail.com>
To: MBA Director CAIAS <director.mba@caias.in>
Cc: Anjali T V <anjali tv@caias.in>, Binu Paul <binuppaul@caias.in>, "Dr. Mohini Bhat" <mohinib@caias.in>, Prasanna Venkatesh s <prasannav@caias.in>

Wed, Nov 17, 2021 at 11:24 AM

Good Morning Sir,

Please find below the write up. I have also attached a photo of mine. Thanks.

Roopam is currently in his 7th year in the wealth management industry. He started his career as a Research Analyst cum Advisor in a fee based advisory startup called Mitraz Financial Services which later got acquired by Scripbox. In this role he was primarily responsible for setting up an advisory team which could cater to the demands of a large client base.

After spending 4 years at Mitraz, Roopam moved to the wealth management vertical of Tata Capital wherein he functioned as an Investment Product Specialist for Bangalore & Chennai. The role was to be in charge of two teams in the South market for Tata Capital clients in terms of investment products counselling.

Early this year, Roopam joined J P Morgan Chase & Co at their Bangalore office as an Associate in the Asset and Wealth Management vertical.

24/03/2022, 13:15

Christ Academy Educational Institutions Mail - Invitation to CAIAS

Regards,
Roopam Goswami

[Quoted text hidden]



Roopam Photo.png
199K

MBA Director CAIAS <director.mba@caias.in>

Wed, Nov 17, 2021 at 11:34 AM

To: Roopam Goswami <roopam.goswami1990@gmail.com>

Cc: Anjali T V <anjality@caias.in>, Binu Paul <binuppaul@caias.in>, "Dr. Mohini Bhat" <mohinib@caias.in>, Prasanna Venkatesh s <prasannav@caias.in>

Thanks Roopam

Best
Be- New

Binu P. Paul Ph.D

Director
School of Business and Management
Christ Academy Institute for Advanced Studies
Begur Road
Bengaluru

[Quoted text hidden]



Profile -Roopam



Roopam is currently in his 7th year in the wealth management industry. He started his career as a Research Analyst cum Advisor in a fee based advisory startup called Mitraz Financial Services which later got acquired by Scripbox. In this role he was primarily responsible for setting up an advisory team which could cater to the demands of a large client base.

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Early this year, Roopam joined J P Morgan Chase & Co at their Bangalore office as an Associate in the Asset and Wealth Management vertical.



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29/04/2022, 14:11

Christ Academy Educational Institutions Mail - Mind the GAP - Corporate Talk series - 20th November - 12.00 - 1.00 PM



Anjali T V <anjalitv@caias.in>

Mind the GAP - Corporate Talk series - 20th November - 12.00 - 1.00 PM

1 message

Prasanna Venkatesh s <prasannav@caias.in>

To: MBA 2020 Batch <mba2020@caias.in>, bba2019@caias.in

Fri, Nov 19, 2021 at 8:58 AM

Cc: Binu Paul <binupaul@caias.in>, "Dr. Mohini Bhat" <mohinib@caias.in>, Anjali T V <anjalitv@caias.in>, Management Faculty <mgtfaculty@caias.in>

Dear Students,

School of Business and Management takes immense pleasure in organizing a Corporate Talk series exclusively for Management students on 20th November 2021, saturday, 12.00 PM - 1.00 PM.

Resource Person and his association:

Mr. Roopam Goswami
Associate Asset and Wealth Management
J.P Morgan Chase & co

For programme execution, following students are identified as student volunteers;

Kiran Deep : Event Report
Johanna : Introduction, welcome address & Guest Profile Briefing
Aishwarya (BBA A Sec) : Vote of Thanks
(Above students, any queries, please feel free to contact undersigned please)

Please find the attachment of event Poster for your reference. Dont Miss the opportunity !

Thanking you

Regards

--



S Prasanna Venkatesh
Assistant Professor
Christ Academy Institute for Advanced Studies
Christ Nagar, Hullahalli, Begur - Koppa Road,
Bengaluru - 560 083
Mobile: +91 9886257025
Email: prasannav@caias.in
www.caias.in

Sakkalawara Post



Director MBA
CHRIST ACADEMY
Institute for Advanced Studies
Hullahalli, Begur - Koppa Road,
Bengaluru - 560 083.



**CHRIST
ACADEMY**
INSTITUTE FOR ADVANCED STUDIES

SCHOOL OF BUSINESS AND MANAGEMENT

CORPORATE TALK SERIES

WEALTH MANAGEMENT

Resource Person - Mr. Roopam Goswami
Associate Asset & Wealth Manager
JP Morgan Chase & Co

The Corporate Talk Series on Wealth Management by Mr. Roopam Goswami, organised by the School of Business & Management, took place on 20th November, 2021, providing an incredible opportunity for the students of final year BBA and MBA, to gain insights and valuable knowledge relating to the field of Wealth Management.

The Resource Person for the day, Mr. Roopam, spoke about major topics such as financial planning, asset allocation, advisors, distributors and liquidity management. The audience was also introduced to the certifications required to pursue a career in wealth management and the various career options that can be chosen in this field.

The presentation was followed by an engaging Q&A session during which the resource person responded to the doubts and queries of the audience. This discussion brought an end to the fruitful and resourceful corporate talk session, leaving a lasting positive impact on the audience with respect to pursuing a career in Wealth Management.

Target Audience: Final year BBA
No: of attendees: 40






Wealth Management

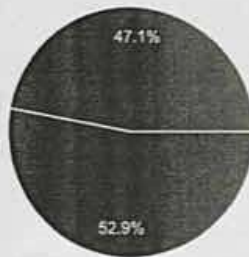
34 responses

Publish analytics

Title

 Copy

34 responses



- Mr.
- Ms.



Nivedita Daniel

Kiran Deep

Shriya

Aishwarya

Hemel

Hansika Venugopal Reddy

Mallikarjun s

Madhu mr

Athota mahi charan

Tanu Sharma

Neeliahgari leela krishna

avitha Kora

POORVA M P

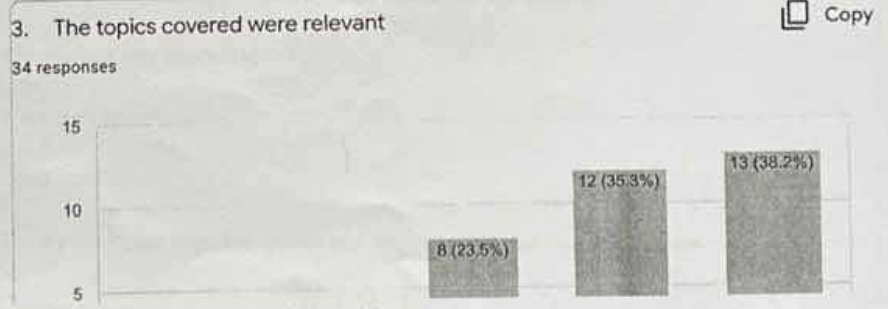
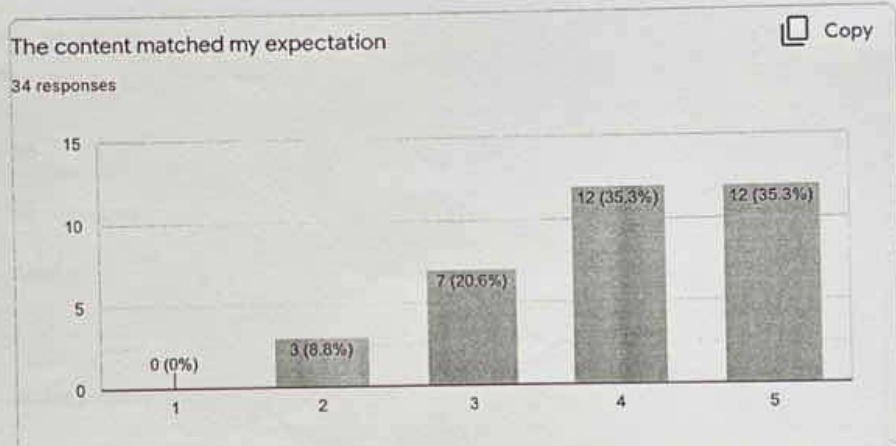
Utkarsh Gupta

Revinto Roy

Rahul Andrews

[Handwritten signatures]





Any other comments/suggestions

34 responses

No

No comments

Good

No suggestions

If its in the class timing's it would be more feasible for the students.

Session was very interesting

It was very beneficial

Good session!

Thankyou for your time. The session was very insightful and I learnt quite a lot!

[Handwritten Signature]
Director-MBA
CHRIST ACADEMY
Institute for Advanced Studies
Hullahalli, Bengaluru - 560 089



SCHOOL OF BUSINESS & MANAGEMENT

CORPORATE TALK SERIES

Date: 20/11/2021

Class: BBA V Sem A

Sl No:	Name	Signature of Student	Name & Signature of Faculty Present
1	AISHWARYA A	<i>[Signature]</i>	D. Sangeetha
2	AKASH ANIL	<i>[Signature]</i>	
3	ALFRED ALAN A	<i>[Signature]</i>	<i>[Signature]</i>
4	ALWIN A	<i>[Signature]</i>	
5	APURVA	<i>[Signature]</i>	
6	ASHLYN SABU	<i>[Signature]</i>	
7	ATHOTA MAHI CHARAN	<i>[Signature]</i>	
8	BHARATH K	<i>[Signature]</i>	
9	DEEPAK R A	<i>[Signature]</i>	
10	DIVYA R	<i>[Signature]</i>	
11	GOWTHAM GOKUL	<i>[Signature]</i>	
12	HANSIKA VENUGOPAL	<i>[Signature]</i>	
13	HASEENA BEGAM F	<i>[Signature]</i>	
14	JEKIVI V WOTSA	<i>[Signature]</i>	
15	KAKABLA RATAN CHANAKYA	<i>[Signature]</i>	
16	KARTHIK S	<i>[Signature]</i>	
17	KAVYA M	<i>[Signature]</i>	
18	MADHU M R	<i>[Signature]</i>	
19	MANISHA S	<i>[Signature]</i>	
20	MD YASEEN	<i>[Signature]</i>	
21	MONISH N	<i>[Signature]</i>	
22	NANDITHA M	<i>[Signature]</i>	
23	NEIL JOSE	<i>[Signature]</i>	
24	PAVITHRA N	<i>[Signature]</i>	
25	PRABHANGSHU THAKURIA	<i>[Signature]</i>	
26	PRIYANKA M	<i>[Signature]</i>	



[Signature]



CHRIST ACADEMY
INSTITUTE FOR ADVANCED STUDIES
SCHOOL OF BUSINESS & MANAGEMENT

CORPORATE TALK SERIES

Date: 20.11.2024

Class: BBA V Sem B

Sl No:	Name	Signature of Student	Name & Signature of Faculty Present
1	ALENALEXANDER	<i>[Signature]</i>	<i>[Signature]</i>
2	ALI AKBAR	<i>[Signature]</i>	
3	APARNA RAVINDRAN	Aparna	
4	ARTISH KUMAR MISHRA	<i>[Signature]</i>	
5	ASHUTOSH BISWAL	<i>[Signature]</i>	
6	BHARATHI M		
7	DEBASHRUTY ROY	Debashruty	
8	GAGANA V	Gagana v	
9	HAMSHA VENI M		
10	HEMEL M	<i>[Signature]</i>	
11	JOHANNA ARLEEN DARRYL	<i>[Signature]</i>	
12	KARTHIK M S		
13	LISHA GOYAL	Lisha	
14	MADHU AARON	<i>[Signature]</i>	
15	MALLIKARJUNA S GUNAKI	mallikarjuna	
16	MAYUR SINGH B	<i>[Signature]</i>	
17	MEGHANA A S	<i>[Signature]</i>	
18	NACHIKETH G M	Nachiketh G. M.	
19	NIVEDITA DANIEL	Nivedita	
20	NOBLE THOMAS	Noble Thomas	
21	PRATIBASINGH G		
22	PURVI KANODIA	Purvi Kanodia	
23	RAKSHIT N	Rakshit	
24	RAKSHITHA K	Rakshi	
25	ROYDEN LESTER PEREIRA	<i>[Signature]</i>	
26	RUTHU S	<i>[Signature]</i>	
27	SAHIL KHAN S	Sahil	
28	SAYED HABEEB NIDHAL K P	Sayed	
29	SHARIKA S		



[Signatures]



Academy Institute for Advanced Studies
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Bangalore
- 560 083
Christ Nagar, Hosangalli

Director-NBA
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