

RESOURCE PERSON

Ram Kumar Gupta

(Finance), PGDWM & FP, NCFM, MCX, NISM, NCDEX Certified

CFP^{CM}, MBA

Career Summary

Complete professional with direct selling experience of over 20 years and more than 16 years in training and courseware development for the Financial Planning Industry. Former Academic Head with ISBF-CFP and worked as a freelancer faculty for various modules of CFPCM, NCFM, NISM, MCX with Industry leaders like ICoFP, and currently associated with **BSE Institute Ltd., Trigya School of Business and Finance**, CIEL, Ambition Academy, Café Mutual, Advisors Organization, Forum India, etc. and conducting IAP for various AMCs with very good results and excellent feedback.

Highlights:

- Former **Head-Academics** at ISBF-Centre for Financial Planning
- Facilitated **Punjab National Bank** into wealth management and financial planning by conducting a five days residential program for senior management group in Feb 2007.
- Prepared courseware for all CFP modules including workbooks.
- Evaluates the short- and long-term effectiveness of materials/programs on regular basis.
- Guest lecturer at NSE, Amity, Inmantech, Bimtech, FPSB and other institutes, shared podium with **Dr. L C Gupta** of derivative fame.
- Conducted training classes for Edelweiss Relationship managers & Dealers, Reliance capital Branch managers, CBSE teachers on FMM, Principal PNB IFA's, etc.
- Conducted training classes for CFP, MBA, Post graduate Diploma.
- Set papers for financial planning module for MBA program at ICoFP for KSOU, Karnataka.
- Specialist faculty for Time Value of Money (TVM) on Casio FC 200V.
- Part of team to conduct management training for MBA students of IMI, Delhi.
- My students cleared derivative's exam with up to 100 percent marks
- Director (operations) with AAP Adventure Tours Pvt. Ltd. Co. for 1 year
- Volunteer, Group Leader, Camp Leader with a society for 2 years.

- Independent sub-broker for 2 years (pre NSE)
- Independent sub-broker for 1 year (with Elite)

Professional Qualification

- **MBA (Finance) from ICAI**
- **CFPcm Certificant** since August 2006
- **Post Graduate Diploma in Wealth Management & Financial Planning** from “International College of Financial Planning”, New Delhi
- **NSE Fundamental Analysis Module (2021)**
- **NSE Wealth Management Module (2020)**
- **NSE Insurance Module (2020)**
- **NSE Financial Markets (Advanced Module) (2020)**
- **NISM-Series-XXI-A: Portfolio Management Services Distributors Certification Examination (2022)**
- **NISM-Series-XII: Securities Markets Foundation Certification Examination (2020)**
- **NISM-Series-XVII: Retirement Advisor Certification Examination (2020)**
- **NISM-Series-V-A: Mutual Fund Distributors Certification Examination (2020)**
- **NISM-Series-X-B: Investment Advisor Certification Examination (2019)**
- **NISM- Series- XV: Research Analyst Certification Examination (2019)**
- **NISM-Series-VIII: Equity Derivatives Certification Exam (2017)**
- **NCFM Certification in Securities Market (Basic) Module.**
- **NCFM Certification in Capital Market (Dealers) Module.**
- **NISM Certification in Mutual Fund (Advisory) Module.**
- **NCFM Certification in Derivatives (Dealers) Module.**
- **NCFM Certification in Commodities Market Module**

- MCX Certification in **Commodities Market** Module
- NCFM Certification in **Debt Market (Basic)** Module

Academic Qualification

M. Sc. Psychotherapy & Counseling
Bachelor of Commerce, Delhi University

Extra Curricular Activities

- Conducted workshops on “Life Enhancement Skills with Meditation” supported and encouraged by Times foundation.
- Learned “**Silva Mind Control Method**” at Delhi
- Diploma in Bach Flower Remedies, Calcutta
- Member Institute of Dr. Bach Remedies, Mumbai
- Learned **Reiki** from Dr. Paula Horan
- Attended One month Theatre workshop By Yatrik
- Trekking, Rock-Climbing, Paragliding, Etc.

Interests

- Reading books (having **more than 4000 books** in my personal library), Making Friends, Counseling, Meditation, & Bach Flower Remedy, etc.

Date:

Place:

(Ram Kumar Gupta)



SHWETA CAMA



CURRENT WORK PROFILE

NGO – Sprit for help welfare organization (2009 - Till date)

TITLE Director

JOB PROFILE

- Currently running financial literacy campaign in Tihar Jail for Prisoners
- Running financial literacy campaign for factory workers, daily wagers, slums etc.

COMPANY – Corporate education & Operations (2009 - Till date)

TITLE Director

JOB PROFILE

- Providing Customize training to Banks, Mutual Fund Houses, Brokerage firms, Colleges & schools

COMPANY – CDSL-Central Depository Service(India) Ltd (MAY2021 – Till Date)

TITLE CONSULTANT TRAINER

JOB PROFILE

- Organizing Financial literacy session to Colleges, corporate & masses
- Delivering session on Financial Literacy

COMPANY IDBI Bank (Sept 2019 – Till Date)

TITLE CONSULTANT TRAINER

JOB PROFILE

- Provide training to there managerial team on Stock Market, Mutual fund & Financial Market.
- Provide training to their Relationship Manager on marketing skills.
- Provide training on Financial Planning Compressed Module.

COMPANY - ICICI PRU AMC, IDBI AMC, Reliance AMC, Birla Sun Life AMC (2018 - Till date)

TITLE Investment Awareness program Trainer

JOB PROFILE

- Providing training under IAP organized by the AMC.
- Organizing and conducting IAPs in school, college, Corporate, NGO, session for economically weaker section and Organizing it pan India.

COMPANY Ambedkar University (Jan2020 – Till date)

Bennett University (July 2020 – Till date)

Banasthali Vidyapeeth University (Dec 2018 – Till date)

TITLE Visiting Faculty

JOB PROFILE

- Teaching MBA Finance
- Teaching BBA & B.Com Program
- Teaching all NISM certifications

COMPANY NISM (2017 - Till date)

TITLE CSR -Consultant Trainer

JOB PROFILE

- Providing training under CSR activity “FEDS”-financial education for defense services
- Providing training under CSR activity “Siddihika”- Initiative for women empowerment in financial sector by getting them certified for Mutual fund certification

COMPANY CIEL (June 2013 – Till date)

TITLE Consultant trainer

JOB PROFILE

- Imparting there session from banking, stock broking to mutual fund industry.

COMPANY NISM (2006- Till date)

TITLE CPE-MUTUAL FUND TRAINER

CPE – EQUITY DERIVATIVE TRAINER

Consultant Trainer

JOB PROFILE

- Provide training on CPE- session
- Provide session on various topics in seminar or workshop organized by NISM

COMPANY Jagan Institute of Management Studies (20 June 2018 – Till date)

TITLE Visiting Faculty

JOB PROFILE

- **Teaching PG diploma in Banking & Financial Services Management**
 1. Principle & practice of Insurance
 2. Principle of Banking
 3. Risk management in Insurance business
 4. Financial statement analysis
 5. Financial Institution & markets
 6. Introduction to Fixed income Securities
 7. Financial Derivative
 8. Taxation of Financial Services
 9. Security analysis & Portfolio management
 10. Wealth management

COMPANY National Stock Exchange (12 June 2013 – Till date)

TITLE Visiting Faculty

JOB PROFILE

- Teaching for NSE –program
 1. Post Graduate Program
 2. The short term program
 3. Teaching in their Summer &winter attachment workshops

COMPANY Bombay Stock Exchange (12 June 2013 – Till date)

TITLE Visiting Faculty

JOB PROFILE

- Teaching for BSE –program
 1. Post Graduate Program in Banking & Finance
 2. Global Financial Market Professional Program
 3. Certificate Program on Commodity & Currency market
 4. The short term program
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EMPLOYMENT BACKGROUND

COMPANY Indian School of Business and Finance (20 August 2011 – 12 June 2013)

TITLE CFP-Department Head

JOB PROFILE

- Content development of CFP
- Taking care of academic, admin & marketing department of CFP
- Taking lecture on various subject in under graduate London school of Economic programmed
- Taking lecture on various subject in Post graduate courses
- Provide training on CFP Following modules-
 - Introduction to Financial Planning
 - Risk management & Life insurance
 - Retirement planning
 - Investment planning
 - Estate planning
 - Advance financial Planning

COMPANY RELIANCE LIFE INSURANCE (JAN2010-JUNE2011)

TITLE CONSULTANT TRAINER

JOB PROFILE

- PROVIDE TRAINING TO NEW ADVISOR AND NEW EMPLOYEE
 - Ic-33 & Product training
 - Risk management and financial planning
 - Basic of financial market
 - Tax Planning
 - Marketing strategy

COMPANY IDBI (NOV2009- JUNE2011)

TITLE CONSULTANT TRAINER

JOB PROFILE

- Provide training to there managerial team on Stock Market, Mutual fund & Financial Market.
- Provide training to there Relationship Manager on marketing skills.
- Provide training on Financial Planning Compressed Module.

COMPANY NJ-Gurukul (APRIL2009- JUNE2011)

COMPANY ICoFP (AUGUST2007- JUNE2011)

COMPANY Indian School of Business and Finance (15 DEC2007- JUNE2011)

COMPANY Indian Institute of Financial Planning (15 DEC2007- JUNE2011)

TITLE VISITING FACULTY AND CONTENT DEVELOPER

JOB PROFILE

- Provide training on CFP Following modules-
 - Introduction to Financial Planning, Risk management & Life insurance
 - Retirement planning, Investment planning, Estate planning

COMPANY ICICI PRUDENTIAL (AUGUST2006-JANUARY 2008)

TITLE CONSULTANT TRAINER

JOB PROFILE

- PROVIDE TRAINING TO NEW ADVISOR AND NEW EMPLOYEE
 - Ic-33 about insurance
 - Product training, Training on how to sell
 - Risk management and financial planning
 - Basic of financial market , Marketing strategy

COMPANY RNIS (AUGUST2007- JANUARY 2008)

TITLE PART-TIME FACULTY AND CONTENT DEVELOPER

JOB PROFILE

- Provide training on CFP Following modules-
 - Introduction to Financial Planning
 - Investment planning

COMPANY ICICI PRUDENTIAL (AUGUST2006-DECEMBER2007)

TITLE ADVISOR

JOB PROFILE

- To market ICICI prudential product and generate business for company

COMPANY NARYANA SECURITIES PVT. LTD. (APRIL2004-SEPT2005)

TITLE TRAINER

JOB PROFILE

- To trained the employee how to trade on the terminal and getting them trained about financial product
- To trained the new clients how to do online trading and making them aware with basic of financial world

COMPANY XPLOIT NEWS (AUGUST2003-APRIL2004)

TITLE FINANCIAL NEWS ANAYZER

JOB PROFILE

- Timely releases of updates & standardization and vetting of news releases to the customers
- Marketing the news capsules to the customer
- To carry out activities with in the stipulated time frame and with designated success level
- Analyzing the news capsule of all business channel

EDUCATION QUALIFICATION:

- Micro masters In Business Management from IIM- Bangalore
- MBA (FINANCE) FROM CCSU in 2008
- B.COM(P) FROM DELHI UNIVERSITY IN 2003
- SENIOR SECONDARY –CBSE ,FROM PRABHU DAYAL PUBLIC SCHOOL, DELHI IN 1998

PROFESSIONAL QUALIFICATION:

- MDP-Rebalance Certificate Volatility course by NSE
- Smart Index trading program by Finlearn & NSE
- “Beyond Bond Basic” by ICFAI business school
- CFP FROM RNIS(RITU NANDA INSURANCE SERVICES)
- LICENSATE IN LIFE INSURANCE
- NSE CERTIFICATION –
 1. FINANCIAL MARKETS: A BEGINNERS’ MODULE
 2. CAPITAL MARKET(DEALERS) MODULE
 3. DERIVATIVES MARKET (DEALERS) MODULE
 4. INVESTMENT ANALYSIS & PORTFOLIO MANAGEMENT
 5. MUTUAL FUND BEGINNER MODULE
 6. EQUITY DERIVATIVE BEGINNER MODULE
 7. NISM – CURRENCY DERIVATIVE MODULE
 8. NISM VA – MUTUAL FUND
 9. INTEREST RATE DERIVATIVES
 10. MCX-SX DEALER MODULE

PERSONNEL DETAILS

NAME : SHWETA CAMMA
DATE OF BIRTH : 21 FEB 1980
HOBBIES : READING BOOKS, PAINTING
RESIDENT : C-316 MILLENIUM APPT, ROHINI -18,DELHI-110089