CEO’s Insights: Client communication in times of Crisis

We are pleased to announce the upcoming webinar *CEO’s Insights: Client communication in times of Crisis *on 1 April, 2020 at 5:30 pm – 6.30 pm IST.

CFA Society India is pleased to host Radhika Gupta who will take us through the below:

Communication defines us. It plays an important role especially in times of Crisis. Practitioners and leaders who communicate well invariably leave an indelible mark on clients. In Investment Advisory, communication plays a critical role and among others, right communication can ensure that client portfolios remain protected -- notional losses do not get converted to permanent Losses.

Learning Outcomes:
1. Understanding how to communicate with clients in times of Crisis
2. Exploring and understanding empathy
3. Understanding the behavioural underpinning in communicating with clients
4. Communication tools and techniques in a virtual environment
5. Strategies and timings for communicating with clients

ABOUT THE SPEAKER:

Radhika Gupta is an investment professional with a range of diverse experiences across asset management – globally and in India, which includes start-up and global giants, public & private sector, and institutional & retail clients. She started her career with McKinsey, later switched to Wall Street, joining AQR Capital – pioneers in hedge funds. She then moved to India in 2009 to start her own venture – Forefront Capital Management, the first registered hedge fund in India, which was acquired by Edelweiss Financial Services Limited in 2014. She led Edelweiss’ acquisition of JP Morgan's Mutual Fund business and Ambit Capital’s AIF business, to become the CEO of Edelweiss Asset Management in 2017. Since then, her efforts are concentrated in helping build brand Edelweiss AMC into a fast growing, differentiated and innovative asset manager. The recent launch of Bharat Bond ETF in partnership with Government of India, India's first corporate bond ETF, is yet another step in that direction.

MODERATOR:

Rajendra Kalur, CFA is an Independent Consultant cum Financial Educator and has over 25 years of experience in the Financial Services domain comprising Asset Management, Investment Banking, Wealth Management and Insurance. Rajendra is currently engaged in mentoring first time entrepreneurs as well as imparting training on various subjects including Leadership, Entrepreneurship and Wealth Management. In addition Rajendra is a member of the Board of CFA Society India and is responsible for Research & Advocacy committee. Till recently he was the Founder Director and CEO of TrustPlutus, a boutique Wealth Management firm which he founded along with Utpal Sheth, Senior Partner of RARE Enterprises. Prior to TrustPlutus Rajendra has worked with RBS N.V., ABN AMRO N.V., Wealth Advisors India Pvt. Ltd., ICICI Prudential AMC, DSP Merrill Lynch and General Insurance Corporation of India in various capacities. Rajendra is an MBA from Cranfield School of Management, UK and holds a post Graduate Diploma in Marketing from Chartered Institute of Marketing, UK. Rajendra is also a Chartered Financial Analyst, from CFA Institute, US. Rajendra is also a certified Ethics Trainer. Rajendra is also a long distance Runner and Cyclist.

EVENT DETAILS:
DATE: Wednesday, April 1, 2020 | TIME: 5:30 - 6.30 p.m.

REGISTRATION:
CFA Society India members: Free | CFA Level 3 Cleared: INR 100 | CFA program candidates: INR 100 | Others: INR 150


Global Passport Accredited Programme

This event is qualified for LOCE credit hours for CFA Society India members