

360 FINANCIAL ADVISORY EXCELLENCE DEGREE

A Program Designed for
Individual Financial Advisors
(IFAs) to Build a Sustainable
Career and Be Future Ready

Designed By
Dr. V. Govindas

**BE FUTURE
READY!**



WHAT CAN YOU EXPECT?

01.

INTRODUCTION

- | ICEBREAKER
- | CHANGE
- | PROSPECTING
- | INSURANCE UNPLUGGED

02.

DATA COLLECTION

- | DEMOGRAPHICS & PSYCHOGRAPHICS
- | GOALS AND EXPENDITURE PATTERNS
- | PREVAILING RISK MANAGEMENT & INVESTMENT PATTERN

03.

360 DEGREE FINANCIAL PLANNING APPROACH

- | THE CONCEPT
- | LIFE STAGES

04.

ANALYZING

- | RISK DECODER
- | DISCUSSING FINANCIAL GOALS
- | BUILDING CONFIDENCE

05.

REPORTING

- | MUST HAVE INSIGHTS
- | RED FLAGS TO AVOID

06.

REVIEW

- | REVIEWING THE REPORT
- | JUSTIFY THE SOLUTIONS

07.

CLOSING

- | SEAL THE DEAL
- | KICKSTART THE JOURNEY

08.

OFFICE OPERATIONS

- | ESSENTIAL OFFICE ELEMENTS
- | WHAT NOT TO DO?

09.

THE NEED OF THE HOUR

- | THE MARCH 31ST GAME PLAN

FINANCIAL ADVISORY EXCELLENCE 360 DEGREE

PROGRAM DETAILS

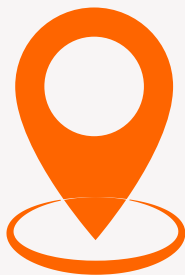
PHYSICAL ENGAGEMENT SCHEDULE

08.30 A. M. TO 06.30 P.M.

Just Rs.
2,999
Per Participant

Includes: Pen, Folder and Notepad i.e.,
Stationeries; Lunch; Hi-Tea and Training

Registrations will only be Confirmed after Submitting the Form and Full Payment is made.



CAUVERY ASSOCIATES LLP

No.6, VENKATADRI, 4th Cross, 1st Main Rd,
3rd Block, Ayyappa Nagar, Krishnarajapuram,
Bengaluru, Karnataka 560036

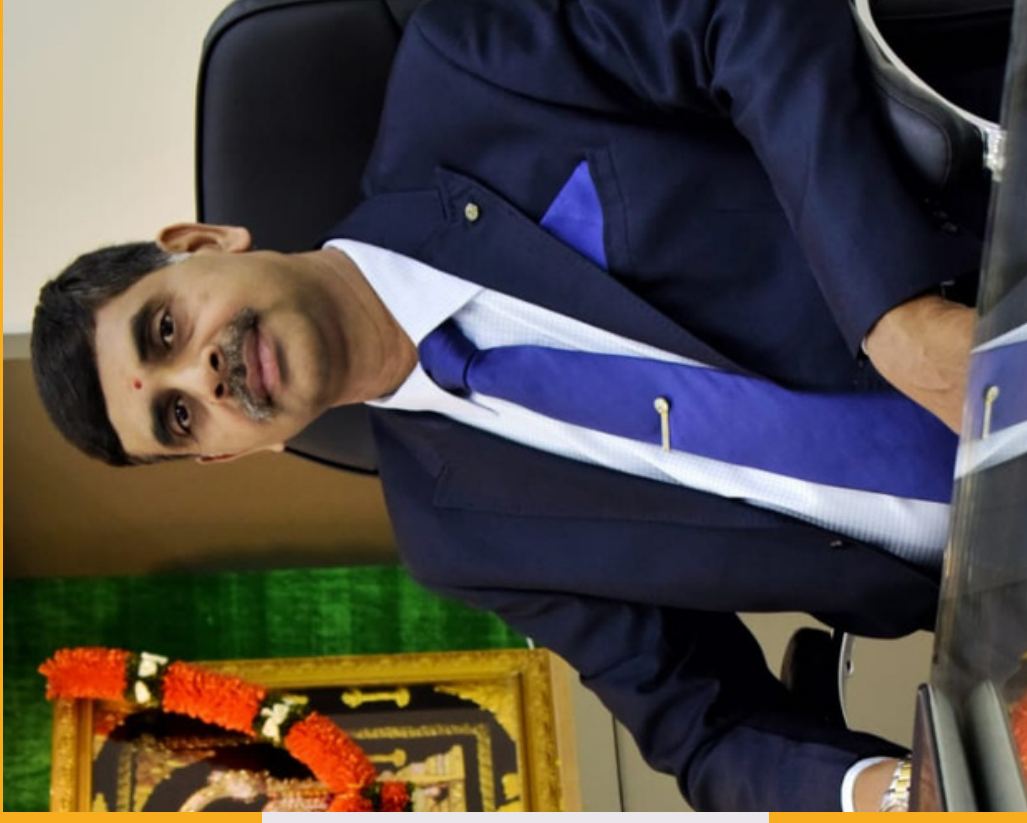
**For Registration & Queries,
Dr. V. Govindas - 98440 55948**

TRAINER PROFILE



DR. GOVINDAS

FINANCIAL ADVISOR | EDUCATOR



Introducing

DR. V. GOVINDAS

Dr. V. Govindas is a Distinguished Financial Advisor, Acclaimed Trainer, and Founder of Cauvery Associates LLP. With over **Three Decades of Experience** since 1994, he has become a beacon in the Finance Industry. As an Educator, he Mentors Future Finance Professionals, instilling values of Integrity and Innovation.

His excellence in Financial Planning earned him an **Award from the Chartered Insurance Institute in the UK** and a Nomination for the **CNBC Life Goal Advisor Award 2018-2019**. He has consistently qualified for the Million Dollar Round Table (MDRT) since 2005, showcasing his dedication to Client Success.

In recognition of his significant contributions to the field, Dr. Govindas was awarded an Honorary Doctorate in Financial Planning Management. This Prestigious Accolade underscores his Expertise and Commitment to Advancing Financial Planning Practices.

Beyond his Professional Endeavors, Dr. Govindas is committed to Financial Literacy, offering Educational Sessions to Young Individuals. His Multifaceted Contributions make him a Leader in both **Financial Advising and Education**, leaving a Lasting Impact on the Industry and Society.

The JOURNEY

**Worked in Otis
Elevators Co. (India) Ltd**
1986 - 1999

**Joined Life Insurance
Corporation of India as an
Agent**
AUGUST 1994

**Joined The New India
Assurance as an Agent**
1997

**Chairman Club Member
for Agents in LIC Of India**
2004

**Apprentice in
Electrical Engineering**
1982 - 1985

**Qualified for MDRT For the
First Time and
Consecutively qualifying
since then.**
2005

**Founded Cauvery
Associates**
2006

**Founded
Anuprama
Academy**
2018

**Partner at
Prudent
Corporate
Advisory**
2016

**Registered Cauvery
Associates LLP under
the Ministry Corporate
Affairs, India**
2020

**Honorary Doctorate in
Financial Planning
Management from
Kennedy University**
2024

**Chief Life Insurance
Advisor (CLIA) in LIC
of India**
2016

**Divisional Managers Club for Agents
in The New India Assurance Co. Ltd.**
2010

**Awarded in Financial Planning
from The Chartered Insurance
Institute, UK**
2009

Major ENGAGEMENTS

THE INTERNATIONAL COLLEGE OF FINANCIAL PLANNING

Completed a Special
Training Programme on
Financial Markets and
Enhancement of Soft and
Sales Skills

ANUPAMA ACADEMY

Trained over 1000+
Financial Professional

MANAGEMENT DEVELOPMENT INSTITUTE, GURGAON

Completed Special
Training Programme on
Insurance and Finance

CAUVERY ASSOCIATES LLP

Advising and Managing 5000+
Families Finances.
Guest Lectures at Various
Educational Institutions to
Educate Young Adults on
Personal Finance

I'm Incredibly honored to share that
I have been awarded an
Honorary Doctorate
in Financial Planning Management!



Major MILESTONE

