

## **ARVIND A. RAO**

---

### **PROFILE**

Founder of **Dreamz Infinite Financial Planners**, a fee-based independent financial planning institution, has over 6 years of experience in the field of financial services. Actively engaged in developing customized solutions and strategies for individuals for financial management.

#### **Past Work Experience:**

Prior to this has worked with **UTI Asset Management Company Private Limited** and **Deloitte Haskins and Sells**. Currently working as 'Chief Planner' with **Dreamz Infinite Financial Planners** which is strongly spreading the fee based financial planning practice and making in-roads in client servicing in various areas ranging from investment planning, tax planning to cash flow planning as per the global standards for financial planning.

#### **Qualifications:**

A **Chartered Accountant**, **Certified Financial Planner<sup>CM</sup>** and **Certified Financial Manager** by qualification, he has special expertise in strategic financial planning and tax planning.

#### **Faculty Experience:**

Has been affiliated as a visiting faculty with various education providers like the **International College of Financial Planning**, **RNIS College of Financial Planning**, **BLB Institute of Financial Markets**, **LJ Business School**, **ITM Institute of Financial Markets**, **Indian Institute of Financial Planning** and **Gurukul Online Learning Systems** for the Certified Financial Planner programme.

Also affiliated with **BLB Institute of Financial Markets** for their various Financial markets programmes and **ITM Institute of Financial Markets** for their PG diploma programmes.

### **Forum Presentations / Trainings:**

Delivered presentations/ training programmes on financial planning subjects at various forums such as **Financial Planning Standards Board (India), Financial Planning Corporation of India Ltd (FPCIL), Principal Mutual Fund, Bajaj Capital, the Society of Financial Planners, etc.**

### **Web and Media Presence:**

Featured articles for **DNA Money, The Week, Business Standard, Idiva.com, Mid-day, Hindustan Times, Indian Express, The Informed Investor**

Has appeared on TV interviews with ET Now & UTV News.

Has been empanelled as an Expert with leading portals like [www.arthamoney.com](http://www.arthamoney.com) and [www.window2india.com](http://www.window2india.com). Has also featured in interviews with Myiris.com

### **Authorship:**

Co-authored the courseware for **'Certified Personal Financial Advisor' examination conducted by NISM (set-up by SEBI)**

Co-authored the compilation on **'Taxation and Financial Planning of Expatriates' issued by the International Taxation Committee, Institute of Chartered Accountants of India.**