



JOGESHWARI EDUCATION SOCIETY  
**JES COLLEGE OF COMMERCE &  
INFORMATION TECHNOLOGY**

Caves Road, Arvind Gandblir Campus, Opp. Rly. Str., Jogeshwari (East), Mumbai 400060.

### Activity Report

Association / Department / Cell:	IQAC
Event / Theme of event:	Wealth Management for Financial Wellness and E-Filing of Income Tax Returns.
Event Committee In-charge:	Prof. (Dr) Sunita Sharma.
Spokesperson / Collaborative agency:	Life Maker Wealth Pvt Ltd.
Date / Time:	2 <sup>nd</sup> May 2023
Venue / Platform:	B.Sc (IT) Lab, Offline.
Objective:	To sensitize and raise the level of financial awareness and also practically explaining about E-Filing of Income Tax Returns.
Outcome:	* Learning about how to manage their personal finance and be able to file their Income Tax Returns Online.
Target Audience:	Teachers of Senior and Junior College
No. of Beneficiaries:	25
Feedback:	<ul style="list-style-type: none"><li>Feedback was received from 16 participants</li><li>All the participants who gave feedback responded</li><li>- That the speaker has in-depth knowledge of the subject</li><li>- The pace of the workshop was good and the speaker could confidently handle the session</li><li>- The participants felt that they could now handle their own wealth management and e-filing of income tax returns</li></ul>



*P. Shelar*

**PRINCIPAL**

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COLLEGE OF COMMERCE SCIENCE  
& INFORMATION TECHNOLOGY  
Caves Road, Jogeshwari (E), Mumbai-400 060.

*S. Sharma*  
2<sup>nd</sup> May 2023





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Tel : 022 2824 5527 / 83568 67783 | Email : jescollegecom@gmail.com | Web : jescollege.edu.in

27<sup>th</sup> April, 2023

To,  
Mr. Vishwnath Pai,  
Managing Director  
Life Maker Wealth Pvt Ltd.

**SUBJECT: Invitation for as Resource Person for Workshop.**

Dear Sir,

We are very happy to share with you that we have initiated NAAC Accreditation journey in our institution. It will be a privilege for us to have you as a speaker for Workshop for teachers on 'Wealth Management for Financial Wellness and E – Filing of Income Tax Returns'.

This will be held offline.

Date: 02<sup>nd</sup> May 2023, Tuesday.

Time: 9.00 a.m. onwards

Venue: IT Lab, JES College.

The participants and organizers will benefit a lot from your expertise on the topic.

Regards and Thanks,

Prof. (Dr.) Sunita Sharma

Coordinator, IQAC

Dr. Prashant H Shelar

Principal





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02<sup>nd</sup> May 2023,

Mr. Vishwnath Pai,  
Managing Director,  
Life Maker Wealth Pvt Ltd.

Sub: Thank You Letter

Dear Sir,

Thank you for accepting our invitation to grace the occasion. We appreciate your keen interest to guide and help our staff and also directing them with your wise words and extraordinary content. We would like to thank you for taking time from your busy schedule to be Resource Person for the Workshop titled **“Wealth Management for Financial Wellness and E – filing of Income Tax Returns”**

JES College of Commerce, Science & I.T. is honored and greatly obliged to have you as Resource Speaker. We look forward to many such interactions in future events.

With warm regards,

Prof. (Dr.) Sunita Sharma  
Coordinator, IQAC

शीलम् परम् भूषणम्

Dr. Prashant H. Shelar  
Principal



**TOPIC: WEALTH MANAGEMENT FOR FINANCIAL WELLNESS**

**SPEAKER: MR. VISHWNATH PAI**

**DESIGNATION: Managing Director – Life Maker Wealth Pvt Ltd.**

**DATE: 2<sup>nd</sup> May 2023**

**TIME: 9.00 – 10.30 a.m.**

**VENUE: B.Sc. (IT) Lab.**

This workshop was open to all staff members. Prior knowledge of finance was not required.

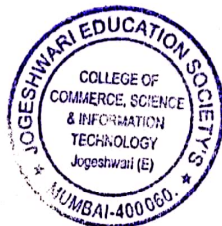
**Objective:** To raise the level of financial awareness of participants and enable them to use the financial information provided to make better short term and long term decisions in managing their personal finance and also be able to file their Income Tax Returns Online.


The session emphasized the necessity and significance of personal finance.

It was based on , 'Four Pillars of Financial Planning'. The session was divided into two sub sessions – first one highlighted various kinds of Insurance Schemes, Medi – Claim Schemes, Critical Illness Schemes and second focussed on Retirement planning and Goal – oriented investment.

The second session focussed mainly on precautions to be taken while investing in any type of saving and investment schemes. The session narrated the steps for planning routine financial activities and the significance of personal financial planning. In the present day scenario, there is fluctuating inflation in the country along with a volatile capital market which has created an apprehension in the minds of the common man about investing in risky avenues such as stock market, derivatives and mutual funds. The session with help of suitable illustrations, demonstrated how with a little care, proper investments can be made even in volatile markets and risky investment avenues.

The session emphasised the importance of term plan, medi – claim policy for securing the dependents and in the rising cost of medical expenses respectively.



  
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**TOPIC: E – FILING OF INCOME TAX RETURNS**

**SPEAKER: MR. VISHWNATH PAI**

**DESIGNATION: Managing Director – Life Maker Wealth Pvt Ltd.**

**DATE: 2<sup>nd</sup> May 2023**

**TIME: 11.00 – 12.30 p.m.**

**VENUE: B.Sc. (IT) Lab**

The second session was conducted on How to File Income Tax Returns Online.

The main objective of organising the session was to explain briefly the importance of filing returns. The presentation covered three major points:

- Filing of return using online software.
- Kinds of Incomes covered under the head Salary and their treatment such as Basic Salary, Dearness Salary, House Rent Allowance, Leave Travel concession and various other allowances and perquisites.
- Income from House Property – Rent and Interest on Home Loan.
- Income from Other Sources – Interest from Saving Bank, Dividend etc
- Section 80C – Fixed Deposit, ELSS etc
- Section 80D – Medical deductions.

Different steps listed to file income – tax return online for assessment year 2022 -2023.

Step1: Login

Step2: Go to 'File Income Tax Return'

Step3: Select the right 'Assessment Year'

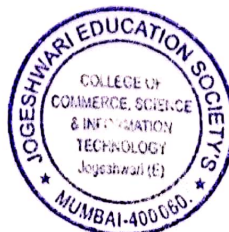
Step4: Select Status

Step5: Select ITR type

Step6: choose the reason for filing ITR

Step7: Add Bank Account Details and other information.

Step8: e – verify ITR



A handwritten signature in black ink, appearing to read "R. Shalakar".

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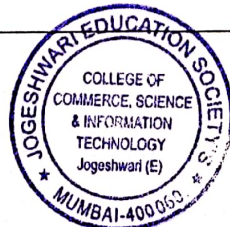
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Date: 2<sup>nd</sup> May 2023.

Venue: B. Sc (IT) Lab.

Activity: Workshop on "Wealth Management for Financial Wellness" & E Filing of Income Tax Returns.

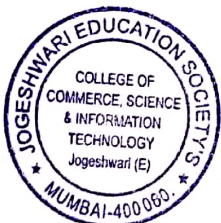
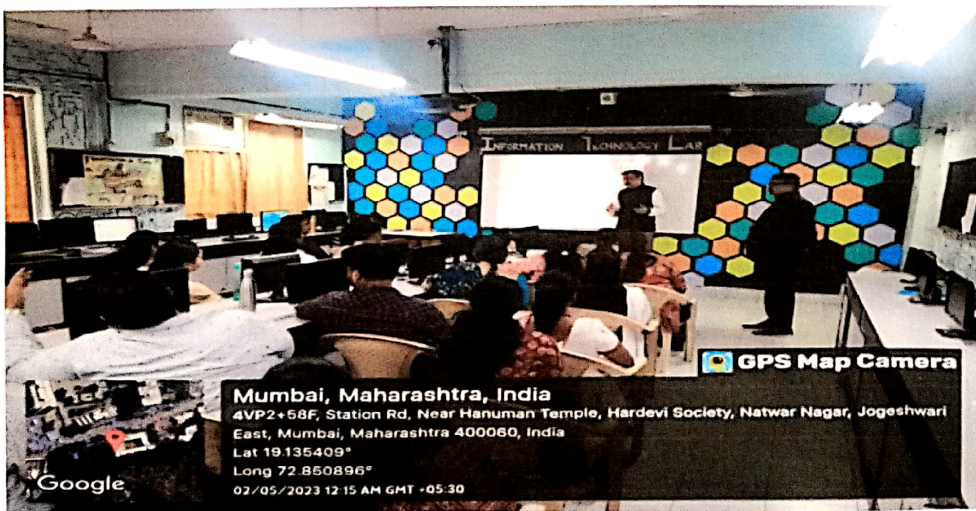
Sr. No.	Name of the faculty / Student	Gender (M/F)	Signature
1.	Dr Prashant H Shelar	M	
2.	Smt. S. RADHIKA RAO	F	
3.	Dr Sunita Sharma	F	
4.	Hyder Khan	M	
5.	Iqbal Baig	M	
6.	HARSH CHOUHAN	M	
7.	Hyacin Thomas	M	
8.	Sanju Chandaliya	M	
9.	Tejaswini Parasab.	F	
10.	Shital Adavkar	F	
11.	Saree warankar	F	
12.	Vansha Poojan	F	
13.	Smrita Mangale	F	







**PHOTOS OF WORKSHOP ON WEALTH MANAGEMENT FOR FINANCIAL WELLNESS AND  
E – FILING OF INCOME TAX RETURNS ( 2<sup>nd</sup> May 2023) ( IQAC Initiative)**

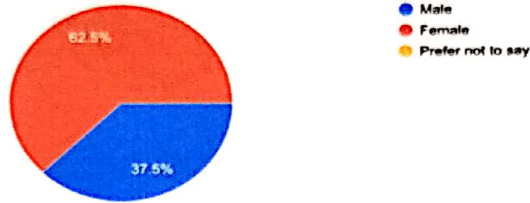


*P. Shinde*  
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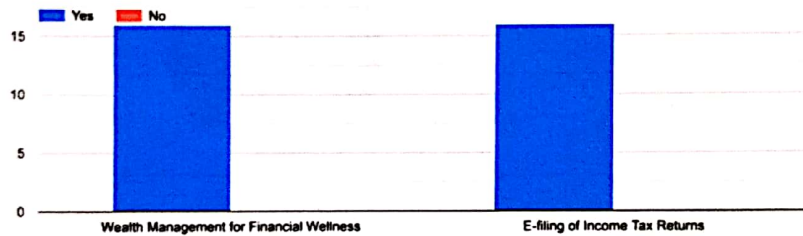


# FEEDBACK REPORT OF WORKSHOP ON WEALTH MANAGEMENT FOR FINANCIAL WELLNESS AND E – FILING OF INCOME TAX RETURNS

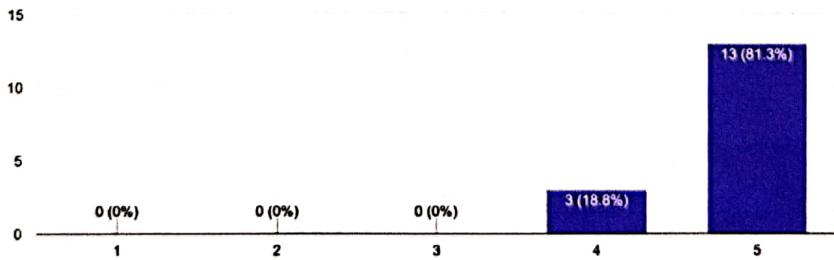
Gender:  
16 responses

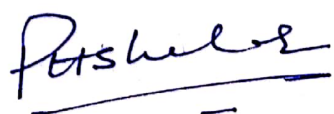


Did the Speaker Mr. Vishwanath Pai gave in-depth knowledge of the subject



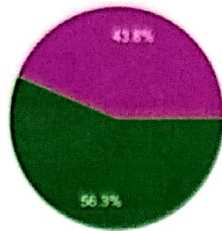
Rate the speaker Mr. Vishwanath Pai on the scale of 1-5  
16 responses



  
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Has the session enhanced your practical understanding of the concept of wealth management and E-filing of income tax returns?

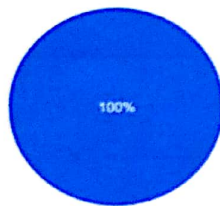
16 responses



- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree

Was the speaker well prepared?

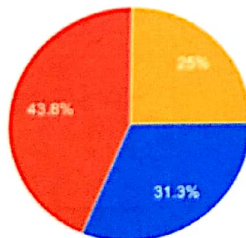
16 responses



- Yes
- No

How was the pace of the workshop?

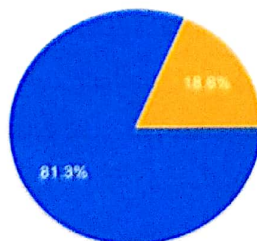
16 responses



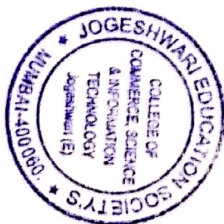
- Excellent
- Very Good
- Good
- Satisfactory

Can you now confidently handle your own wealth management and e-filing of income tax returns?

16 responses



- Yes
- No
- Maybe



*P. Shukla*

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