



JOGESHWARI EDUCATION SOCIETY'S
COLLEGE OF COMMERCE SCIENCE & INFORMATION TECHNOLOGY

(AFFILIATED TO UNIVERSITY OF MUMBAI)

JES Education Complex, Caves Road, Arvind Gandbhir Campus, Jogeshwari (East), Mumbai - 400 060.

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

List of Documents – Workshop on Wealth Management & E-Filing (2022-23)

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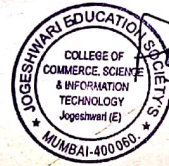


**JOGESHWARI EDUCATION SOCIETY'S
COLLEGE OF COMMERCE SCIENCE AND IT
&
LIFE MAKER WEALTH PVT LTD. ORGANISES**



IQAC - INITIATIVE

TOPIC : WEALTH MANAGEMENT FOR FINANCIAL WELLNESS
SPEAKER : MR. VISHWANATH PAI
DESIGNATION : MANAGING DIRECTOR – LIFE MAKER WEALTH PVT LTD.
DATE : 2ND MAY, 2023
TIME : 09.00 AM – 10.30 AM
VENUE : IT LAB





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&
LIFE MAKER WEALTH PVT LTD. ORGANISES**



IQAC - INITIATIVE

TOPIC : E-FILING OF INCOME TAX RETURN
SPEAKER : MR. VISHWANATH PAI
DESIGNATION : MANAGING DIRECTOR – LIFE MAKER WEALTH PVT LTD.
DATE : 2ND MAY, 2023
TIME : 11.00 AM – 12.30 PM
VENUE : IT LAB





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

Caves Road; Arvind Gandbhir Campus; Opp. Rly. Stn.; Jogeshwari (East); Mumbai 400060.

Finance
Income

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 nd 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"> Feedback was received from 16 participants All the participants who gave feedback responded - That the speaker has in-depth knowledge of the subject - The pace of the workshop was good and the speaker could confidently handle the session - The participants felt that they could now handle their own wealth management and e-filing of income tax returns |



R. Shelar

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 Caves Road, Jogeshwari (E), Mumbai-400 060.

S. Sharma
 2nd May 2023



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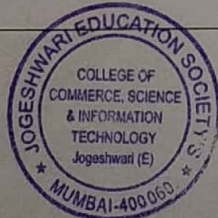
Tel : 022 2824 5527 / 83568 67783 | Email : jescollegecom@gmail.com | Web : jescollege.edu.in

Date: 2nd 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 | <u>Prashant</u> |
| 2. | Smt. S. RADHIKA RAO | F | <u>Radhika Rao</u> |
| 3. | Dr Sunita Sharma | F | <u>S. Sharma</u> |
| 4. | Hyder Khan | M | <u>Hyder</u> |
| 5. | Iqbal Baig | M | <u>Iqbal</u> |
| 6. | HARSH CHOUHAN | M | <u>Harsh</u> |
| 7. | Hyacin Thomas | M | <u>Hyacin</u> |
| 8. | Sanju Chandaliya | M | <u>Sanju</u> |
| 9. | Tejaswini Parab. | F | <u>Tejaswini</u> |
| 10. | Shital Adavkar | F | <u>Shital</u> |
| 11. | Saee Warankar | F | <u>Saee</u> |
| 12. | Vaishu Poojan | F | <u>Vaishu</u> |
| 13. | Smrita Mangale | F | <u>Smrita</u> |



| | | | |
|----|-------------------|---|------------------|
| 14 | Heena Nakum | F | <u>Heena</u> |
| 15 | Reeta Halwai | F | <u>Reeta</u> |
| 16 | Smita Kumbhe | F | <u>Smita</u> |
| 17 | Shubhrajy Bhanu | F | <u>Shubhrajy</u> |
| 18 | Lata S Bangera | F | <u>Lata</u> |
| 19 | Rasika S. Narkar | F | <u>Rasika</u> |
| 20 | Almes - N. Virji | F | <u>Almes</u> |
| 21 | Rubina Shaikh | F | <u>Rubina</u> |
| 22 | Prachi Shar | F | <u>Prachi</u> |
| 23 | Jigna Sadhe | F | <u>Jigna</u> |
| 24 | Vaishali. Trivedi | F | <u>Vaishali</u> |
| 25 | Chitworth. Ket | M | <u>Chitworth</u> |



P. S. Chelae

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REPORT OF WEALTH MANAGEMENT FOR FINANCIAL WELLNESS

TOPIC: **WEALTH MANAGEMENT FOR FINANCIAL WELLNESS**

SPEAKER: **MR. VISHWNATH PAI**

DESIGNATION: Managing Director – Life Maker Wealth Pvt Ltd.

DATE: 2nd 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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REPORT - E - Filing

TOPIC: E – FILING OF INCOME TAX RETURNS

SPEAKER: MR. VISHWNATH PAI

DESIGNATION: Managing Director – Life Maker Wealth Pvt Ltd.

DATE: 2nd 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



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Vishwanath Damodar Pai
Date OF Birth 10/08/1968
Mobile :- 9819826150
Email :- vishwanathpai68@gmail.com
Web:- lifemakerwealth.com

B.Com., Certified Financial Planner., IRDA Approved Insurance Advisor, NISM V-A Mutual Fund Distributor, NISM X Authorize Portfolio Manage Services.

Started Lifemaker Wealth Pvt Ltd. In 1998

Managing 200 Cr Asset Under Management with 1200 Family .

Conducted more than 200 Investor Education Programs & Work Shop.

Achievements: -

Attended Various Club Member Ship Such as Branch Manager, Zonal Manager from Life Insurance Corporation Of India

Received Top Performer Award From Various Mutual Fund House.



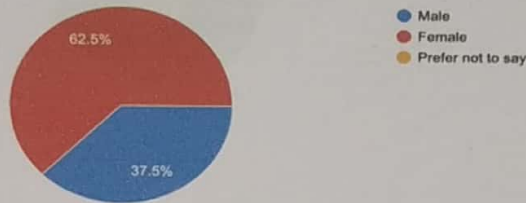
**PHOTOS OF WORKSHOP ON WEALTH MANAGEMENT FOR FINANCIAL WELLNESS AND
E – FILING OF INCOME TAX RETURNS (2nd May 2023) (IQAC Initiative)**



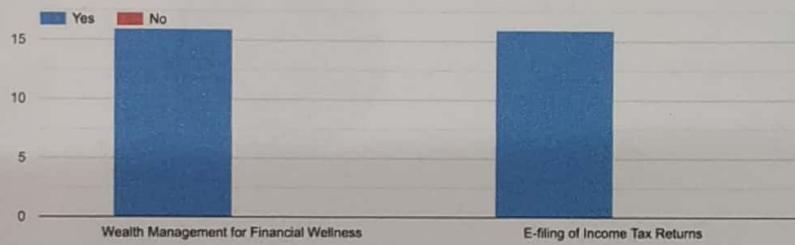
Rishel
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FEEDBACK REPORT OF WORKSHOP ON WEALTH MANAGEMENT FOR FINANCIAL WELLNESS AND E – FILING OF INCOME TAX RETURNS

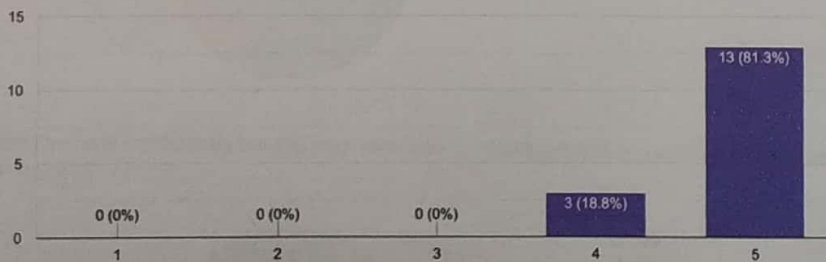
Gender:
16 responses



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



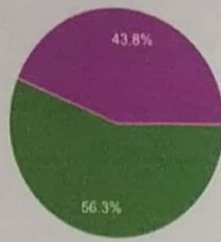
P. Shelar

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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?

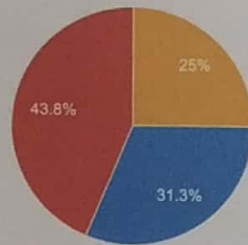
16 responses



- Yes
- No

How was the pace of the workshop?

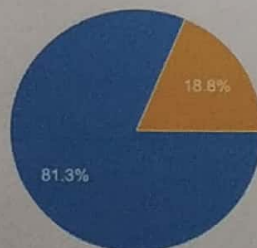
16 responses



- 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. S. Shelar

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