

Certificate Course

Financial Planning and Wealth Management

[Specially Curated for students of KBP College, Vashi]

BACKGROUND

'Personal Finance' is a fast-growing area of expertise, especially with the growing integration of financial markets in India with those in the world. Financial Planning and Wealth Management are the latest 'trending areas' of specialisation for young professionals. More and more professionals are learning personal financial planning either to manage their finances better, or to take up the opportunities as independent Financial Advisors or employment opportunities in the Banking, Insurance, Mutual Funds, Stock Broking and Fintech space.

COURSE OBJECTIVES

- To introduce the participants on the need to be 'smart with money management'
- To expose the participants to the important terms, rules, concepts, and principles related to financial planning & wealth management.
- To help participants learn about the process of savings, investments, insurance, and wealth creation in the long term.

COURSE CONTENT

- Introduction to Financial Planning and Wealth Management
- Investment Evaluation Framework

- Risk Profiting & Asset Allocation
- Investment Products & Services
- Equity: Investment & Risk Management
- Debt: Investment & Risk Management
- Alternate Assets: Investment & Risk Management
- Risk Management through Insurance
- Elements of Personal Taxation

COURSE OUTCOMES

After completing the course, the participants will be able to:

- Comprehend the concepts of saving, investment, insurance and retirement planning.
- Understand the Investor Psychology around savings and investment and use the same in preparation of financial plan
- Understand and practically implement the concept of 'goal-based planning'
- Prepare basic personal financial plan for individuals and HNIs, including tax planning

COURSE FORMAT AND ASSESSMENT PATTERN

- Course will be conducted over 30 hours of interactive sessions
- Sessions can be offline (classroom) or online (zoom/google meet) mode
- Batch size: 25 – 30 students per batch
- Assessment (MCQ-based) pattern as under:

Type of Questions (MCQ-based)	Number of Questions	Duration (Minutes)	Maximum Marks	Passing Marks (%)	Negative marking
Conceptual	25	25	25	50%	No
Practical	25	25	25	50%	No

- Successful participants will be awarded certificates.
- Fees: Rs. 2,000/- per participant. (GST additional)