

**Rayat Shikshan Santha's**  
**Karmaveer Bhaurao Patil College, Vashi , Navi Mumbai**  
**Department of B.Com Accounting and Finance**  
**Skill Based Course Report**  
**Wealth Management & Financial Planning**

**SKILL BASED COURSE SUMMARY**

The Skill Based Course by Department of B.Com Accounting and Finance was conducted on the topic of Wealth Management course commenced from 24<sup>th</sup> November 2020 and ended on 19<sup>th</sup> February 2021. The Course was conducted on Google Meet (Online) platform. Certificate Course on Wealth Management and Financial Planning comprised of a course sessions and a certificate in the appropriate form to those who qualify for the same

**ABOUT THE COURSE**

The objective of this Course was to equip the members with the principles of Management of Wealth as well as devising effective Investment Strategy and the practical procedural aspects and to build the competency level of the members of the Institute to position them as multidisciplinary financial consultants. This Course was intended at enlightening the students. The emphasis was on developing skill sets which would be required for advising clients to make sound financial decisions while practicing and serving clients in diverse practice areas as compliance, taxation etc.

**COURSE CURRICULUM**

1. Introduction to financial planning
2. Risk Analysis & Insurance Planning
3. Retirement planning & employee benefits
4. Investment planning
5. Tax & estate planning
6. Advanced financial planning and HNI Wealth Management
7. Technical Analysis

**LEARNING OUTCOMES**

1. The candidate to have enhanced career opportunities in Financial Services Investments guidance and wealth management.
2. The candidate to have Global league of the best Financial Planning professionals.
3. Students are able to understand the importance of wealth management and financial planning in day to day life..

**FEEDBACK**

Students also submitted their feedbacks for the course conducted on the following link -  
<https://forms.gle/F1XUXHyoN8tdjbbD6>



कोषागार कार्यालय, वॉश  
- 5 OCT 2020  
मुद्रांक प्रमुख लिपीक / लिपीक

2020

19 OCT 2020

WY 795656

### MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding is done at **KARMAVEER BHAURAO PATIL COLLEGE** Vashi, Navi Mumbai.

### **BETWEEN**

The Rayat Shikshan Sanstha's **KARMAVEER BHAURAO PATIL COLLEGE VASHI, NAVI MUMBAI**, (hereinafter referred as **K.B.P. College**) a Government recognized and autonomous college affiliated to the University of Mumbai rendering services for the propagators of education in Arts, Commerce, Sci. and professional courses in this area/region, through **Dr. Shubhada Nayak**, the Principal of the College, having address at Sector 15 A, Jahunagar, Vashi, Navi Mumbai- 400 703, as the party of **FIRST PART**.

### **AND**

**EMBCL(Eminent Minds Business Consulting LLP)**through **Mrs. Mecna Sawant**, Chief Business Partner , having office at NL-5, Building-7/16, Sector-11, Ncrul, Navi Mumbai, 400703, Phone 9987430269, believes " Training is the act of increasing the skills of a student for doing a particular job" as the party of the **SECOND PART**.

On

20<sup>th</sup> October, 2020 for the academic year 2020-21

## DETAILS ABOUT COURSE

Department of B.COM (Accounting and Finance)  
Skill Based Course - Wealth Management and Financial Planning

2020-21

1. Eligibility	: Pursuing UG/PG
2. Duration	: 30 Hrs.(online)
3. Intake Capacity	: 60 Per Batch
4. Theory & Practical	: 30 Hrs. (20+10)

### Objectives of the Course

Wealth Management has developed into one of the most respected and highly compensated occupation in the financial services industry. Globally, the financial advisers have emerged as the most recent class of experts who either as entrepreneurs or as working professionals in banks or other investment advisory firms create financial plans for their clients and also help them to accomplish their financial goals.

This perfectly designed comprehensive course is a combination of Financial Market and Soft Skills. This will aid the student in understanding financial goals and also enable to increase, maintain and conserve wealth, as well as be equipped with the required soft skills to excel. Also, to equip students with the principles of Wealth Management as well as devising effective Investment Strategy, the practical procedural aspects and to build the competency level to position them as multidisciplinary financial consultants. This Course is intended at enlightening the students. The emphasis is on developing skill sets which would be required for advising clients to make sound financial decisions while practicing and serving clients in diverse practice areas as compliance, taxation etc.

### Outcome of the Course

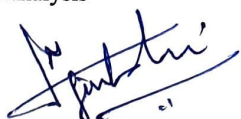
- 1.It will help to improve employability of the students.
- 2.Students to have enhanced career opportunities in Financial Services, Investments guidance and wealth management.
- 3.Students to have Global league of the best Financial Planning professionals.
- 4.Students will be able to understand the importance of wealth management and financial planning in day to day life.

### Syllabus

#### Theory

20 Hours

1. Introduction to financial planning
2. Risk Analysis & Insurance Planning
3. Retirement planning & employee benefits
4. Investment planning
5. Tax & estate planning
6. Advanced financial planning and HNI Wealth Management
7. Technical Analysis



**Practicals****10 Hours**

Trading on Virtual Platform available Online.

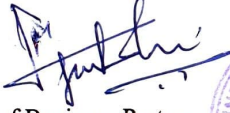
Market Study and Research

Live Case Study

**EXAMINATION PATTERN**

I.	Online Exam 60 Marks	
	Multiple Choice and Descriptive Questions	
II.	Practical- 40 Marks	
Sr. No.	Particulars of Practical Examination	Marks%
1	Practical	30
2	Internship	10
	TOTAL	40
III	Total - I+II	100

Signed, Sealed and Delivered By

**Meena Sawant**

Chief Business Partner

EMBCL( Eminent Minds Business Consulting LLP)  
Nerul, Navi Mumbai.**Dr. Shubhada.Nayak**

Principal

Karmaveer Bhaurao Patil College,  
Vashi, Navi Mumbai.**In Witness-****1) Mr Pankaj Dandge**

## Payment and Rendering of Bills

### Fees

College Share (40%)	EMBCL Share (60%)	Total Fees
Rs. 800	Rs. 1,200	Rs.2000/- Per Student

- Rs.1, 200/- per student to be paid in 2 installments of 50% each.
- 1<sup>st</sup> within the first week of online training commencement.
- 2<sup>nd</sup> immediately after the online examination marks/grades are declared.
- Soft copies of certificates will be sent via mail within a week of declaring marks/grades.
- Invoice will be raised to KBP College for each installment.
- The cheque should be drawn in favour of **Eminent Minds Business Consulting LLP**





Rayat Shikshan Sanstha's

# KARMAVEER BHAURAO PATIL COLLEGE, VASHI (AUTONOMOUS COLLEGE)

Sector -15A, Vashi, Navi Mumbai. 400703.

Reaccredited by NAAC with 'A+' Grade, CGPA 3.53, ISO 9001:2015 Certified Institute, "Best College Award" by University Of Mumbai

*in Association With*

## EMBCL

### Department of B.Com (Accounting & Finance)

*Skill Based Course in*

**"Wealth Management and Financial Planning"**

**Certificate of Completion**

*This is to certify that Mr. / Miss. \_\_\_\_\_ of \_\_\_\_\_ has completed the Skill Based Course of 30 Hours in "WEALTH MANAGEMENT AND FINANCIAL PLANNING" in the academic year 2020-2021 and obtained \_\_\_\_\_ grade.*

**Mrs. Meena Sawant**  
Chief Business Partner, EMBCL

**Mr. Pankaj D. Dandge**  
Convener

**Dr. Shubhada Nayak**  
Principal