Workshop Title:
Financial Planning & Wealth Management

Target Audience:
Relationship Managers from Banks, Financial Planners, Wealth Managers, Insurance, Mutual funds, Portfolio Management Professionals, Product Development Specialists in various financial services firms.

Duration:
One day (9.30 a.m. – 5.30 p.m.)

Methodology:
Case study based and group exercises will be organized to have a practical exposure to the creating a financial plan.

Registration Fees:
Rs. 5,000/- plus taxes

Workshop Objective:
The Objective of this program is to focus on the process of preparing Financial Plan, understand asset classes and products besides client profiling.

Contents:

The process of financial planning

- Establishing the relationship between the planner and the client
- Client data collection and understanding goals
- Analysis of client needs, desires and finances
- Developing financial plan – Asset allocation process
- Financial plan implementation
- Monitoring and review

Financial Plan Construction

- 6 step financial planning process in detail
- Case Study

Understanding Asset classes – Equity, Debt, Commodities, Derivatives, Mutual Funds, Insurance and Other Products

Comparative analysis of competing products

Taxation relevant for Wealth Managers