



TrainingCentral

Basic Wealth Management and Financial Planning

Program Structure



TrainingCentral

The course is designed with following objectives in mind:

- To make students of Finance well versed with the craft of Wealth Management and Financial Planning.
- To make sure that the students are well aware with the basics of the Wealth Management before they move to Advanced part.
- To make students capable enough so that they can manage their finances well in life.

Learning Outcomes

- Understand the importance of different asset classes in Portfolio.
- How inflation and Interest rates are correlated
- What Factors determine your Financial Behaviour
- The understanding of difference between Absolute and Annualized return
- How to file ITR on your own
- The importance of insurance in Financial Planning

Program Structure

- Wealth Management and Life Cycle: A Case Study
- Knowing yourself is the most important tool in one's hand.
- Fundamental Analysis or technical Analysis which one do you need
- Solving the dilemma of being a Trader or an Investor
 - Rakesh Jhunjhunwala
 - Warren Buffet
- How the Economy affects the markets of a country and world: A case study on Inflation and interest rates.
- Is Inflation as insignificant as we ignore it in the daily Life?
 - A case study on Milk and Bread to demonstrate the effects of Inflation.
- Let's Understand your Financial Behaviour: A Test
- Why do we need a Health Insurance and Term Insurance.

- Case Study: Ignorance is not always bliss.
- Need Analysis for Insurance
- The Asset classes and the comparison of their returns
 - Case Study: Perception about gold is erratic
- Playing with returns: Calculating Absolute return, Annualized returns on excel using real time examples of different asset classes
- Explaining rule of 72 and its usage
- Reverse engineering of Returns calculation
 - Case study: If I know how much I need can I calculate how much I need to save regularly.
- Mystery of all times Resolved: An exercise on Excel template to create an optimal equity portfolio using Mean, Correlation, Variance and Covariance
- Are loans really bad?: Discussion with Examples
- How to calculate EMIs without using paper, pencil or calculator
- The importance of Emergency Fund in One's life: The curious case of Celebrities who go from riches to rags in a Jiffy
- Panicking is the worst virtue one can have while investing in the markets:
 - A case study on how patience brings big corpuses with itself.
- Filing Tax return for an individual is easy: Lets demonstrate through a couple of cases

Assessment

- A group exercise where a case study will be given so that all aspects of the course are covered
- A MCQ test of 30 questions

Target Audience

BBA , B.com and MBA Students and people interested in improving their knowledge of Financial Markets.

Prerequisite:

Not much just basic terminology or knowledge of Basic concepts of Finance and Economics .

Duration

30 hours



Faculty Profile

Faculty –Kanwaljit Singh

Education

MBA in Finance

Professional Experience

Experience : Has 13 years of experience in practicing and teaching of Capital Markets

Worked as a Branch Manager with HDFC Bank, Played a role of Asst Prof at LPU Currently heading a CSR project of Bajaj Finserv for Punjab and Himachal. Also conceptualized two start ups of cost effective skill enhancement courses. Profile of Anchor