



The background image shows a hand placing a coin on a stack of coins. To the left of the coins are two wooden house models. The scene is set on a wooden surface with a blurred green background. A diagonal watermark with the Phire logo and text is overlaid across the center.

Wealth Management

Introduction to Financial Planning



- Indian Economic Environment
- Introduction to Investments
- Meeting client's needs through Financial Planning
- Regulation of the Indian Financial System
- Fundamentals of Investment Concepts
- Investment Products



Managing & Marketing of Financial Services



- Marketing – the beginning
- Segmentation and Product Development
- Communication
- Distribution & Pricing
- Conflict Resolution
- Case study



Investment & Risk Management – Equity



- Investment Concepts
- Asset Classification
- Risk & Return
- Market Theory
- Securities Market/Equity Market
- Depository
- Regulations & Framework



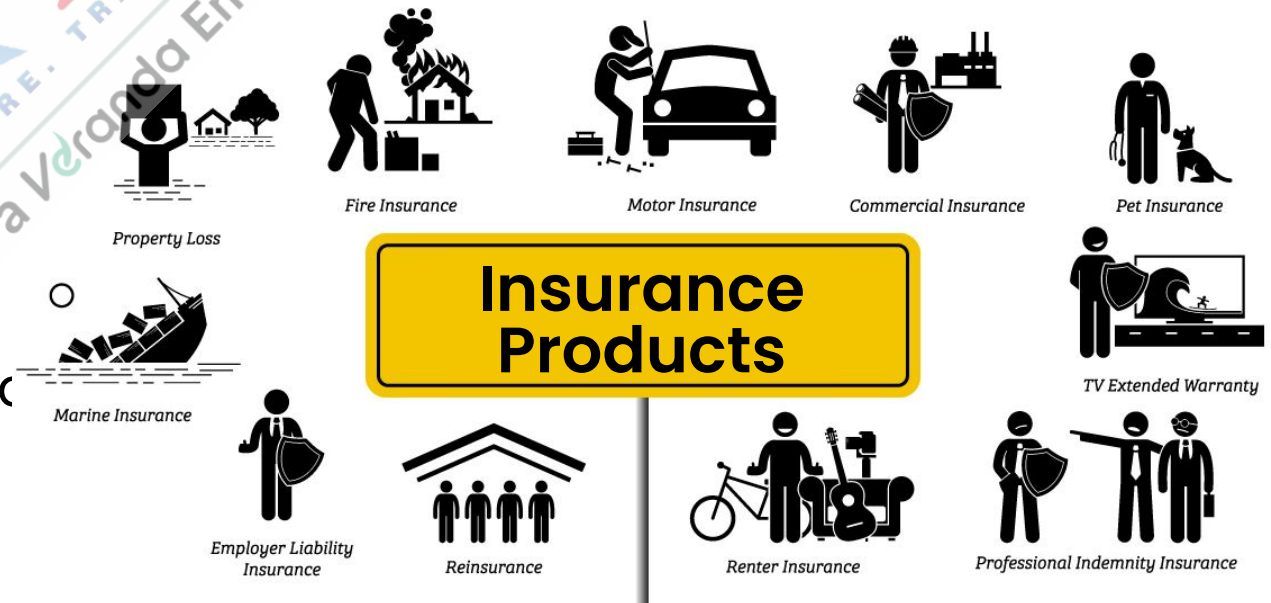
Investment & Risk Management – Debt

- Debt Instrument – Concepts
- Indian Debt Market
- Govt Securities, Treasury Bills & State Govt Bonds
- Call Money Market
- CPs & CDs, Repos
- Trading in Govt Securities
- Bond Valuation
- Yield Curve
- Fixed Income Derivatives



Insurance Products

- Introduction to Insurance principles
- Structure of Insurance Organisation & Functions
- Life Insurance and its practices in India
- Group Life Products
- Liability Insurance
- Health Insurance
- Motor Insurance
- Fire Insurance
- Marine Insurance
- General Insurance & Its Practices in India
- Risk Management
- Financial Planning & Insurance



Pension Products

- Need for Retirement Planning
- Pension Schemes in India
- Investing your Savings
- Taxation



Mutual Funds Products & Services



- Mutual Funds Concepts
- Fund Accounting & Valuation
- Portfolio Management
- Performance Measurement & Evaluation of MF Schemes
- Mutual Funds as an Investment
- Unit Holder Protection



Banking Products & Services

- Introduction
- Types of Deposit Accounts
- Charges on Secured Advances
- Retail Banking
- Wealth Management
- Banking Products



Wealth Management - Curriculum		
SI No	Topics	Duration in hours
1	Introduction to Financial Planning	3
2	Wealth Management & Economy	3
3	Investment & Risk Management - Equity	4
4	Investment & Risk Management - Debt	4
5	Investing in Gold & Real Estate	4
6	Estate Planning	4
7	Commodity Trading	4
8	Investment Products & Services	4
9	Investment Evaluation Framework	4
10	Risk Profiling & Asset Allocation	4
11	Risk Management through insurance	4
12	Elements of Taxation	4
13	Taxation of Investment Products	4
	Total	50