MANAGEMENT DEVELOPMENT PROGRAMME
ON
PERSONAL FINANCIAL PLANNING

OBJECTIVES

How much should I save every month for a self-reliant and respectful post-retirement life? What should I do with my savings? Where should I invest? Am I and my family appropriately covered for all risks and random events? If these questions puzzle you and make you too dependent on your chartered accountant or helpless in front of agents luring yourself into complex instruments, then this programme is for you. Beyond merely knowing tax-saving instruments, this programme builds skills and knowledge base on the actual day-to-day calculations that one needs to make on a continuous basis given the dynamism of life, job and your dreams.

Meticulously designed, this program is based upon rigorous research on prosperous business communities such as Marwari's, known for their business acumen and growing personal wealth faster than significant others. We shall deploy a very methodological, yet simple approach in making you understand complex terms and conditions as well as calculations. We will also offer personalized feedback based upon individual requirements.

In addition, leveraging our location in Marwar-region, you will get to visit the bazaars thereby getting a peek into the world of shrewd and frugal businessmen.

TARGET PARTICIPANTS

The programme is open to Junior and Middle Management Officials and Academicians.

PEDAGOGY

Lectures through audio-visual presentation, Structured exercises, Group discussion and Case studies. They would also be provided with a kit and course material.

TOPICS TO BE COVERED

Fixed income instruments
Equity: Active and Passive investing; Role of SEBI
Mutual Funds: Types, evaluation techniques, Role of AMFI
Commodities: Bonds and ETFs; Role of commodity exchanges
Life insurance: Various kinds of plans and add-on(s); Role of IRDA; eIA
Health Insurance: Terms and conditions; Evaluation techniques
Tax Planning: Investments, Risk coverage and home loans
Real Estate, REITs and infrastructure investment trusts
Retirement Planning: Pension Plans and provident funds
Leveraging Fin-tech for personal financial planning

PROGRAMME FEE, DURATION, DATE AND VENUE

The programme could be run in online mode. The duration of the programme could be three days. The fee for the programme is **Rs. 15000 per participant.** Group discounts available. Program will run from 17th March,2023-19th March, 2023

Payment details along with the completed application form should reach by 5th March, 2023. The fee covers study material and lodging.

PROGRAMME COORDINATOR(S)

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Link for Registration: https://forms.gle/gdD5fm6GhsWmyrim9

Link for Payment: https://oa.iitj.ac.in/ePay