Course Outline for Wealth Management & Financial Planning Workshop

Session Name	Topics
Financial Planning Overview	Wealth building Strategies & it's link with the overall Financial Planning Process
Financial Planning Process	Building the trust factor
Money Skills on Excel	Learn to know how money works
FP as a profession	Analysis of the Financial Planning / Wealth Management Industry
Insurance & Risk Management	Risk Analysis, Methods of Handling Risk, Risk Transfer through Insurance
Quantum of Life Insurance Required	How much Insurance do we need? HLV & Need Based Concepts
Life Products & Comparative Analysis	Understanding Different Type of Insurance Products
Case Studies on Insurance	Structuring Insurance Recommendation
Importance of Retirement Planning	Demographic Trend (India & Global) – Impact on Retirement
Retirement Planning Mathematics	Case Study on Retirement Planning Mathematics
Retirement Planning	Continuation of "Case Study on Retirement Mathematics"
Trends in Retirement Planning Products	Pension Products
Investment Planning	Understanding Asset Classes
Investment Planning	Creating a dynamic asset allocation model using Goal Seek & Solver
Investment Planning	Selecting Mutual Fund
Taxation & Estate Planning	Understanding taxation from the point of view of a Financial Planner
Estate Planning	Case Studies on Estate Planning
Case Study	How Financial Planning can make a difference
Report Writing	Writing a Financial Plan