

Course Name	Personal Financial Planning & Wealth Management			
Course Objective	To inculcate a basic sense of financial responsibility and sensible decision making in students. To also make them aware of various investment and insurance products and make them proficient enough to analyze them effectively.			
Course Outcome	Students will be able to gather, analyze and compare the pros and cons of various financial products for savings, investments, insurance and will be able to make sound financial decisions regarding loans.			
Course Duration and Pedagogy	<ul style="list-style-type: none"> • Total 30 hours course delivered over 8 weeks <ul style="list-style-type: none"> ○ 15 hours - Self-paced video lessons ○ 4 hours - Live Online Doubt Solving Sessions ○ 4 hours - Live Offline Doubt Solving Sessions ○ 7 hours - Assignments and self-study <p>Final schedule will be given before the commencement of course</p>			
Trainer Name and Profile	<p>Mr. Jash Vora</p> <ul style="list-style-type: none"> • BFM from NM College and M.Com. from UPG College • Ex. Wealth Relationship Manager at ICICI Bank • Ex. Wealth Manager at Fintoo • Mentored 1000+ students in Technical Analysis and Personal Finance 			
Reference Books and Readings	<ul style="list-style-type: none"> • Trainer Notes • Books mentioned in Book Review 			
Assessments				
	Assessment Detail	Assessment Type	Duration	Marks
	Test after Module 2	MCQ	30 Mins	20
	Test after Module 4	MCQ	30 Mins	20
	Test after Module 6	MCQ	30 Mins	20
	Final Evaluation	MCQ + Case Study	60 Mins	40
	Total Marks			100
Course Curriculum				
<ol style="list-style-type: none"> 1. Time Value of Money & Compounding <ul style="list-style-type: none"> ○ Insights about Compounding ○ Rule of 72 ○ Time Value of Money ○ Inflation 				

2. Savings and Investments
 - Government Saving Schemes
 - Debt and Fixed Income
 - Small Saving Schemes
 - Equity Investments
 - Real Estate Investments
 - Gold and Other Asset Classes
3. Mutual Funds
 - Types of Mutual Funds
 - Analyzing MF Performance
 - Historical vs Future Performance
 - Market cycles and MF performance
4. Insurance
 - Investment vs Insurance
 - Types of Insurance
 - Calculating your coverage requirement
 - Analyzing Insurance returns
5. Loans
 - How loans affect your financial well being
 - When is right to take a loan?
 - Loan details – what to take care of
 - How interest rate changes affect your loan
 - Credit Cards and BNPL products
6. Book Review
 - Rich Dad Poor Dad
 - The Psychology of Money
 - Just Keep Buying
7. Financial Planning Basics
 - Setting financial goals
 - Calculating an investment plan
 - Planning and choosing the right investment vehicles
 - How to keep yourself on the path of financial goals
8. Financial Planning Case Studies