EXECUTIVE WEALTH MANAGEMENT PROGRAM

Certification Powered By

CII

Confederation of Indian Industry

Mode: Virtual Live

Duration: 4 Months

Limited Seats Available

REGISTER NOW

Contact Us: 79777-01315

www.talentskillsvarsity.com

Overview:

This program equips you with the knowledge & skills to effectively manage your finances. We cover a wide range of financial disciplines, from investment strategies to tax planning, to help you achieve your financial goals.

Course Objectives:

- **Wealth Management Fundamentals:** Learn core principles & practices.
- **Personalized Planning:** Build a plan to achieve your financial goals.
- **Investment Analysis:** Master techniques for informed investment decisions.
- **Portfolio Construction:** Build well-diversified portfolios for risk management & returns.
- **Alternative Investments:** Explore options for portfolio diversification.
- **Tax-Efficient Strategies:** Understand tax implications & develop tax-efficient plans.

Who Should Attend?

Recent graduate students, young professionals, or individuals interested in building a strong foundation in wealth management.

What will you Learn?

Module I : Equity Analysis

- Equity Markets & Structures
- Fundamental Analysis
- Industry Analysis
- Company Analysis
- Models of Equity Valuation
- Wealth Management Perspective

Module II : Mutual Funds

- Types of Mutual Funds Schemes Exchange Traded Fund
- Accounting Valuation
- Measuring Mutual Fund Performance
- Mutual Fund Investment Plans & Services

Module III : Technical Analysis

- Introduction to Technical Analysis
- Theories Techniques & Benefits
- Important Aspects of Technical Analysis
- Charts & their patterns
- Trendlines - Support & Resistance
- Importance of Volume
- Moving Averages
- Technical Indicators – 1

Module IV : Risk Management

- Risk Identification
- Risk Measurement
- Risk Transfer
- Risk Financing
- Concept of Probability
- Creating a Risk Management Plan

Module V : Insurance

- Introduction to Insurance
- Principle of Insurance
- Types of Insurance
- Insurance as a financial tool
- Insurance Claims

Module VI : Retirement Planning

- Introduction to retirement planning
- Retirement Planning Principles
- Steps for ideal retirement planning
- How much you should invest to create your retirement fund?
- Calculation of Retirement corpus

Module VII : Wealth Management

- What is Wealth Management?
- Comprehensive Wealth Management
- Estimating Wealth Market for a
- Country
- Wealth Management Verticals
- Financial Planning
- Wealth Management Landscape & Outlook in India
- Wealth Management Models in India

Module VIII : Wealth Management Process Developing a Wealth Management Plan

- Essentials of a Comprehensive Wealth Plan
- Analyse Financial Issues & Opportunities
- Developing the Wealth Management Plan
- Implementation & Review of the Wealth Management Plan
- should invest to create your retirement fund?
- Calculation of Retirement corpus

Module IX : Portfolio Management

- Introduction to Portfolio Management
- Investment Risk
- Types of Investment Returns
- Measures of Risk
- Managing Risk through Diversification
- Asset Pricing Models
- Asset Allocation
- Equity Portfolio Management Strategies
- Fixed Income Portfolio Management

Module X : Alternate Products In Wealth Management

- Derivatives-Options & Swaps
- Alternate Assets
- Hedge Funds
- Commodities & Managed Futures
- Private Equity
- Credit Derivatives
- Structured Products
- Alternatives and Risk Mitigation
- Alternate Assets in India

Module XI : Indian Tax Laws & Legalities in Wealth Management

- Introduction to Income Tax
- Heads of Income & Income under the Head Salary
- Income from Business & Profession
- Income from House Property
- Filling of Tax Return
- Tax Planning, Tax Avoidance, Tax Evasion & Tax Management
- Filling of Tax Return
- Equity Portfolio Management Strategies
- Fixed Income Portfolio Management

Outcomes:

Upon successful completion of the Program, participants will gain the following benefits:

- Craft personalized financial plans for clients (goals, risks, strategies).
- Build diversified portfolios with optimal returns and risk management.
- Advise on investments like mutual funds, ETFs, and insurance.
- Plan for retirement and manage risk for clients.
- Navigate taxes and estate planning for smooth wealth transfer.

Our Faculty:

The faculty members at our institution are not just leaders in their respective fields; they serve as the academic backbone shaping future leaders. Renowned globally for their innovations, they go beyond their field advancements, actively contributing to evolving business practices worldwide. Collaborating with stock exchanges globally, they play an active role in crafting curricula and training methods tailored to meet corporate demands.

Dr. Shariq Nisar

PhD in Economics

LinkedIn Profile

Jyoti Budhia

Derivatives & Technical Analyst

LinkedIn Profile

Karan Joshi

Technical & Derivatives Analyst

LinkedIn Profile

Why Learn with Us:

Live Virtual Classroom

Learn Online from Mentors

Case Study Based Approach

Industry Recognized Certification

Registration Process:

For details, contact
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Payment Mode:
Debit Card | Credit Card | Bank Transfer

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