JSPF303: Wealth Management

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CREDIT – 2

Course workload

Using the table below, indicate the expected student workload for this Course.

Contact Hours	Group Work/ Supervised Learning Hours	Directed Learning Hours	Total Hours
20	10	30	60

Learning Outcomes for the Course

- Understand the concept of wealth management.
- Appreciate the financial life cycle for model individual types.
- Design Personal Financial Plans for individual types.
- Evaluate different investment channels for wealth creation.
- Apply Indian Tax laws relevant to wealth management.

TOPICS COVERED

- Overview of Wealth Management
- Understanding personal financial goals
- Money Management Strategy: create personal financial statements, and evaluate client's current fin. Position, budgeting
- Asset Classes: Equity, debt as an asset classes, instruments, structured products and Real estate, Mutual funds and Hedge funds as an asset class, Asset allocation strategies
- Insurance and Risk Management:
- Retirement planning, strategies for planning golden years, instruments for retirement planning, Defined benefit plans and defined contribution plans
- computation of tax liability of client, understand concepts of tax avoidance and tax evasion,
- Estate planning: modes of doing estate planning, Will, revocable trust, joint ownership, pros, and cons
- Emerging trends in WM, Financial planning.

For additional details, visit : https://jagsom.edu.in/careertrack/

Meet our faculty: https://jagsom.edu.in/faculty-directory/