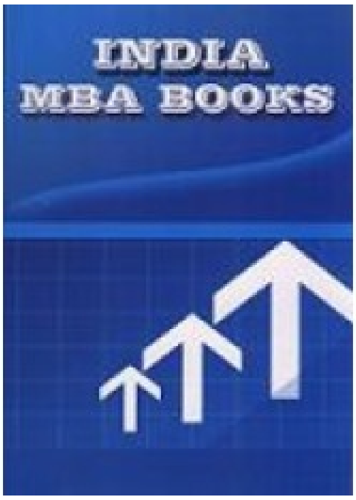
PERSONAL FINANCIAL PLANNING SOLVED NOTES EBOOK CHAPTERWISE



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PREVIEW OF CHAPTERS SYLLABUS

PERSONAL FINANCIAL PLANNING

Description

1. Basics of Personal Financial Planning: Definition, Importance and process of financial planning, Concept of time value of money in single and series.

2. Managing Investment Risk: types of risks, measurement and management of risks and financial statements.

3. Measuring Investment Returns: Risk and Return trade-off, Short term and long term capital Gains. Choosing the various source of credit and credit alternatives.

4. Investment Vehicles: Investment concerns, Small saving schemes, Fixed income Instruments, Mutual funds and other investment schemes and Asset classes.

5. Investment Strategies: Various Strategies and asset allocation. Evaluating investment in various stocks and Various Loans and their usage.

6. Investment Strategies: Investing in stocks, bonds and commodities and concept of Futures and options.Insurance Planning;-Personal risk management, Nature and function of Insurance, Need analysis and Various Insurance products. Concept of Health Insurance.

7. Retirement Planning: Process, Annuities and its types, Asset allocation & diversification and concept of mortgage and its types.

8. Tax and Estate Planning: Various heads of incomes, Exemptions in Income tax applicable to various categories. Concept of wealth Tax. Estate Planning need and creation of Will and various formats.

9. Strategies of putting together a Complete Financial Plan: Benefits, Essential components of comprehensive financial plan. Implementing Personal Financial Plan.

10. Regulatory Environment: Government regulations and various regulators like SEBI, IRDA, and ethical issues involved in Financial Planning.

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