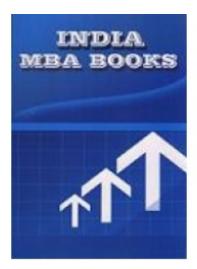
Personal Finance



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Personal Finance

Unit I:

Planning for Personal Finance: Process of Planning and Personal Finances, Rewards for Sound

Financial Planning, Personal Financing Goals, Planning Environment, Determinants of Personal

Income. Mapping Financial Future, Balance Sheet of one's present worth, Income and Expenses

Statement- What you earn and where you spend it, preparing and using personal financial statements,

preparing and using budgets, putting a dollar value on financial goals (time value of money).

Understanding Income Tax Principles, Effective Tax Planning. Role of Cash Management in Personal

Financial Planning, Cash Management Products, Establishing a Saving Program. (12 Hours)

Unit II:

Shelter Management Meeting House Needs: Buy or Rent, Financial Criteria for buying a house, How

much housing one can afford, home buying process, buying an automobile, Financing Decision of

Buying a car. Credit Management, Credit Use, Basic Concept of credit, different types of credits,

principles of using credit wisely, features of consumer loans, single payment loans and installment

loans. (10 Hours)

Unit III:

Life Insurance: Basic concept, need of insurance, how much life insurance is right, choosing a right

policy, key features of life, insurance policies, buying an insurance policy. Health Insurance: importance

of health insurance, health insurance policies, health insurance decisions- coverage of expenses and

policy provisions, health insurance check list, long term care insurance, disability insurance, property

insurance, principles of property insurance, home insurance, automobile insurance, other property and

liability insurance. Anything insurance claim settlement. (10 Hours)

Unit IV:

Investment Management: Planning Objectives, reward of investing, determination of amount of

investment, securities market-types of securities, investment decisions, managing investment portfolio.

Investing in Bonds- risks and benefits. Mutual funds investment, types of funds, funds services,

choosing a best mutual fund, investing in real estate, investing in gold, investing in gold ETF.

Retirement planning: overview, social security, pension plans, retirement programs. Estate Planning –

principles of estate planning, trusts, estate taxes, estate planning Techniques. Tips for preparing a will

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