Matrix training

Program Title

Introduction to Financial Planning

Program Duration

2 days (0930-1730 hrs)

Program Objectives

By the end of the program, the participants would be able to:

1. Appreciate financial planning as the most systematic method to achieve financial goals
2. Understand the various needs of different types of clients and provide appropriate solutions
3. Be aware of pitfalls in financial planning so as to avoid them in practice

Program Outline

Day	Time	Session	Details	Methodology
I	**AM**	Introduction to Investments	○ Characteristics of Investment – Risk, Return & their trade-off, Liquidity, Investment Effort, Minimum Size etc	Instructor Led Discussion (ILD)
	AM	Introduction to Financial Planning	○ Financial Planning – Definition ○ Basis for FP – Life Cycle Stages, Wealth Cycle stages ○ Process of Financial Planning ○ Elements of a Plan	ILD
	PM	Financial Planning Strategies	○ EPSIS Conundrum ○ Risk Management & Insurance Products ○ Power of Compounding ○ The Asset Classes, their behavior and expected returns ○ Asset Allocation & Its principles ○ Comparison of various investment instruments ○ Direct vs. Indirect Investing	ILD
II	**AM**	Taxation	○ Taxation as it applies to various investment products. Appropriate choice based on investment products	ILD
		Misc	○ Estate Planning ○ Derivatives & their impact ○ Investment Trivia	ILD
	PM	Case Studies	○ Steps to Financial Planning ○ Case Studies ○ Common Pitfalls	Case Studies

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