Program Title
Wealth Management & Role of Insurance

Program Duration
1 day (0930HRS – 1730HRS)

Program objectives
By the end of the program the delegates would be able to:

- Challenge perceptions about insurance and its suitability
- Build a holistic approach to Wealth Management

Program Outline

This experiential learning course revolves around the following key input areas:

Day	Session Title	Session Details	Methodology
1 AM	WM – Perspective	Role of a Wealth Manager World view – Wealth Management in different countries Wealth Managers a growing tribe Wealth Management – Current AUMs, comparison with other countries	ILD
1 AM	Customer Perspective	The upwardly mobile Indian Financial Needs Pyramid Rational & Emotional Needs	ILD
1 PM	Wealth Manager's Toolkit	One-Stop Solution Provider Product Push vs. Planner Product Suite Dip Stick on product knowledge	ILD Quiz
1 PM	The Insurance Opportunity	Why or Why Not pitch insurance? Who needs it more – client or I? Business Opportunity – Insurance penetration in India Savings & Investment Rate Insurance considerations Beyond Wealth Creation	Group Activity ILD
2 AM	Skill Building	Perseverance Chosing your turf Understand Customer-Product fitment Handling Common Objections	Role Plays Case Studies
	Activity Plan		

Program Participants

Employees in customer facing roles

Min/Max Participants - 15-20