FinShiksha

Certification Course in

Wealth Management

… Become a proficient Wealth Manager

ABOUT COURSE

Wealth Management is one of the fastest growing industry in India. As the wealth in the country increases, the number of people sourcing services around Wealth Management will also increase, and so will the number of jobs in this area. People in India are taught how to earn money, not how to manage it - so there will be big need of quality Wealth Managers over the next few years. This course aims to create the knowledge base one would require to build a career in Wealth Management, or Manage their own wealth.

Course Highlights

Certificate on successful completion of the Course
Open Online Test to assess applicability of concepts to close to real scenarios

Thoughtful Mix of Theory and Practical Applications
Topics mapped to industry case studies

In-depth knowledge of Asset Classes and Products
Understand various segments of Wealth Management

Learn the Behavioural Finance Concepts
Master the key aspects of executing a successful Financial Planning task

Experienced and Qualified Faculty – IIM Alumnus
Concepts explained by IIM Alumnus Instructor along with views from Industry Professionals

Course Outline

- **Introduction to Wealth Management**
  - Introduction to Wealth Management
  - Wealth Management Ecosystem and Players
  - Client Perspectives and Offerings
- **Financial Mathematics and Concepts**
  - Introduction to Financial Maths
  - Excel Functions for Wealth Management
  - Return Measures
  - Risk Measures
- **Securities Markets and Other Asset Classes**
  - Equity Markets
  - Debt Markets
  - Real Estate
  - Commodities
- **Mutual Funds**
  - Introduction to Mutual Funds
- **Equity Mutual Funds**
  - Features of Equity Funds
- **Debt Mutual Funds**
  - Introduction to Debt Mutual Funds
- **Insurance**
  - Introduction to Insurance
  - Life Insurance
  - Non-Life Insurance
- **Financial Planning Concepts**
  - Introduction to Financial Planning
- **Behavioural Finance**
  - Introduction to Behavioural Finance
  - Behavioural Finance – The Human Mind
  - Why People sell their investments early
  - Behavioural Finance – Biases
- **Taxation**
  - Introduction to Taxation
  - Calculation of Taxation in various real life scenarios

WHO SHOULD TAKE THE COURSE

- Student planning to start a career in Financial Services Domain
- Aspirants targeting a role in Wealth Management
- Professionals wanting to move laterally as a Wealth Manager

Eligibility

Graduates / Post-Graduates interested in Finance Domain

Professionals working in Finance Industry

Basic Excel skills

INSTRUCTOR

Peeyush Chitlangia is an Alumnus of IIM Calcutta & MNIT Jaipur, Peeyush has been in the financial services industry for the last 14 years & has extensive exposure to Equity Research & Financial Modelling. With more than 50,000 man hours of teaching experience, he has trained nearly 15000 participants across organizations.

COURSE FEATURES

- Self-Paced with 25+ Online Videos
- 30 Hours of Effort needed
- Assignments on Mutual Fund
- Certification Test
- Regular guidance from the Experts
- 1 year access

CERTIFICATION

The course will have an online assessment. The final Certification will be an open Online test, which would be untimed, and open book. We would try and keep the assessment as close to a real-life situation as possible, where you will have all the tools that you would have in real life at your disposal.

HOW TO REGISTER

You can buy the Course at:

www.finshiksha.com/courses/wealth-management-certification

FOR MORE DETAILS

Write to : hello@finshiksha.com

Call us at : +91-9137314913

Website : www.finshiksha.com