JUx
THE LEARNING HUB

JGi JAIN
DEEMED-TO-BE UNIVERSITY

Your Gateway to

# Wealth Management Career

Explore | Educate | Excel

EXECUTIVE PROGRAM IN

# WEALTH MANAGEMENT

*India's 1st Online Finishing School*

## JUx

JUx is an Online learning and engagement platform of Jain (Deemed-to-be University) offering industry relevant, in demand programs that enable learners to achieve their career goals. JUx offers you the opportunity to learn from industry pioneers, engage with best industry coaches and mentors who can enhance your career opportunities and make you future ready. We are committed to providing an exciting knowledge experience for every learner and aim to develop a community of learners who can develop their full potential for a promising career. The programs offered by JUx are the perfect blend of theoretical knowledge and practical skill that is in keeping with the current industry requirements.

## Jain (Deemed-to-be University)

Ranked among the top universities in India and considered a cerebral destination for students across the world and Bangalore in particular, for its illustrious history of developing talent, Jain (Deemed-to-be University) is a hub for learning in every sense of the word.

The University which is based in Bangalore – the Silicon Valley of India, offers a conducive environment for learning, be it academically or extracurricular activities. Known for its emphasis on education, entrepreneurship, research and sports, Jain (Deemed-to-be University) has some of the best minds in the educational and research fields, and centers that inspire entrepreneurship and groundbreaking work to simplify and manage life better.

What makes Jain (Deemed-to-be University) different is its outlook towards life, its values and beliefs. Its ever-evolving and open-minded system and quest for continued success and resilience, has made it one of the top universities in India.

## About the Program

Wealth Management is a service that gives you financial and investment advice, accounting and tax services, retirement planning, legal and real estate planning for a specific fee. The ultimate goal of working hard and earning money is so that we can have a peaceful and wealthy lifestyle later. But a lot of times we don't know how to grow our wealth to achieve those goals. It requires a lot of planning, investment, right information and discipline. This is where wealth management comes in handy and makes your life easier. It is a long term process that helps your money grow over a period of time.

This program ensures to cover all the basic and advance concepts of managing someone's wealth by taking care of each and every aspect needed to give financial and investment advice. This program is designed to suit the needs of young graduates who have passion in learning about the world of finance and develop a career in the same. The curriculum is developed and delivered online by top academicians and Industry experts with extensive experience in this field. The program has assignments, project work for a better understanding of the concepts

**Course Start Date:** 11th June 2020
**Duration of the Course:** 6 Weeks
**Class Schedule:** 5.00 PM to 7.30 PM
on Tuesdays, Thursdays, Saturdays & Sundays
**Mode of Delivery:** Online Instructor Led

## Key Highlights

- Get Certified from Jain (Deemed-to-be university)
- Curriculum designed by Academia & Industry
- Instructors from Jain (Deemed-to-be University) and Industry
- Master Classes – Well Crafted Webinars and Workshops delivered by Industry Experts
- Access to the latest tools and techniques along with their business applications
- Weekly Assignments for better understanding of concepts
- 30 Hours of Project Work
- Curated Mentorship
- 24*7 LMS Support
- Access to 30 Hours of Career Building Soft Skill Self-Paced Content
- Career Support – Webinars on Personality Development & 1:1 Career Counselling Sessions
- Placement Assistance

## Who can take this program?

This program is most suited for those who want to make Banking as their Career. Also, it suits the entry level working professionals who want to upskill and update their banking knowledge and expertise.

- Any Graduates
- Also, Working Professionals who with a work experience of upto 2 years
- Students Pursuing Graduation and Post Graduation

## Curriculum

### Introduction to Financial Planning

- Introduction to Financial Market
- Economic Environment and Indicators
- Equity Investment
- Debt Management
- Monetary Policy
- Budgeting
- Cash Flow and Budgeting
- Concept of Behavioral Finance

### Risk Analysis & Insurance Planning

- Concept of Insurance
- Principles of Insurance
- Risk Management
- Difference between Insurance and Hedging
- Asset Valuation and Rate Making
- Insurance Policy Analysis
- Life Insurance Analysis
- Insurance - Need Based Approach
- Types of Life Insurance Policy
- Bonus in Life Insurance Policy
- Surrender Value

### Retirement Planning & Employee Benefits

- Retirement Benefits
- Employee Benefits
- Time Value of Money and its Application
- Provident Fund
- Pension
- Gratuity
- Leave Encashment
- Public Provident Fund and Loan Against PPF
- New Pension Scheme

### Investment Planning

- Classification of Fixed Income Securities
- Mutual Fund Products
- Equity/Debt Vs Mutual Fund
- Classification on the Basis of Asset Classes
- Debt Funds
- Derivatives
- Futures
- Options
- Intrinsic Value and Time Value
- Diversification Strategies
- Analysis of Returns
- Equity Evaluation
- Bond Valuation
- Investment Strategies
- Valuation Ratios

### Investment Planning

- Tax System & Direct Taxes
- Residential Status & Scope of Total Income
- Income from Salaries
- Income from House Property
- Income from Other Sources
- Income from Business Profession
- Capital Gains
- Agricultural Income
- Clubbing & Set-off and carry forward of Losses
- Deductions
- Exempt Income
- Estate Planning
- Will
- Power of Attorney
- Trust

## Course Outcome

**Upon completion of the course students will be able to**

- Acquiring core understandings in and across the disciplines that contribute to the domain of Wealth Management
- Relating these conceptual frameworks to dimensions of practical areas on the ground.
- Engage with the complex financial markets, human attitudes and investment lifecycles.
- The program through its rigors and practical orientation prepares the students to apply the concepts and skills developed in the program in actual work environment.

## Orientation and Batch start Date:

- Online Instructor Led
- Orientation 9th June 2020
- Batch start Date 11th June 2020

## Job prospects

- *Private Banker*
- *Wealth Manager*
- *Wealth Advisors*
- *Investment Manager*
- *Portfolio Manager*
- *Fund Manager*