DIPLOMA IN FINANCIAL PLANNING & WEALTH MANAGEMENT (DFPWM)

Overview of the course

The scenario of personal finance in India has witnessed a dynamic change with the improvement in income levels and increase in awareness. A huge and complex variety of financial products have also evolved in the market to cater to the increasing demands of customers. In such a scenario the need for professional advice for financial planning and wealth management has assumed great importance. The program is designed to equip the participants with skills for advice in tax planning, investments planning and retirement planning.

Highlights of this program

- To develop expertise in Financial Planning and Wealth Management.
- To develop sound knowledge of portfolio and capital market theory, the corresponding empirical evidence, and applications in practice.
- To provide a thorough understanding of marketing concepts and activities related to the special requirements of the marketing of financial services.
- To equip the students with skills necessary to provide a comprehensive investment advisory.

Structure of this program

Semester-1	Subjects	Credits
1	Management Theory and Practice	4
2	Organisational Behaviour	4
3	Business Economics	4
4	Corporate Social Responsibility	4
5	Information Systems for Managers	4
6	Business Communication and Etiquette	4

Semester-2	Subjects	Credits
1	Introduction to Financial Planning and Investment Planning	4
2	Tax Insurance and Retirement Planning	4
3	Financial Accounting & Analysis	4
4	Capital Market and Portfolio Management	4
5	Marketing of Financial Services	4
6	Business Law	4