Certified Wealth Manager

Syllabus

Introduction:

Financial Planning

a. Background
b. Role of Financial Planner
c. Financial Planning Process
d. Contract and Documentation
e. Client Data Collection
f. Client Data Analysis
g. Life Cycle
h. Wealth Cycle
    i. Risk Profiling and Asset Allocation
j. Systematic Approach to Investing
    i. Systematic Investment Plan (SIP)
    ii. Systematic Withdrawal Plan (SWP)
    iii. Systematic Transfer Plan (STP)

Wealth Management & the Economy

a. Financial Planning to Wealth Management
b. Economic Cycles and Indicators
    i. Lag Indicators
    ii. Co-incident Indicators
    iii. Lead Indicators
c. Interest Rate Views
d. Currency Exchange Rate
e. The Deficits
i. Revenue Deficit and Fiscal Deficit ii. Current Account Deficit

Investment & Risk Management: Equity

a. Role of Equity
b. Active and Passive Exposures
c. Returns from Passive Exposure to S&P CNX Nifty
d. Sector Exposure and Diversification
e. Fundamental and Technical Analysis
f. Fundamental Valuation Approaches
g. Investment and Speculation
h. Leveraging

Investment & Risk Management: Debt

a. Role of Debt b. Deposits and Debt Securities
c. Valuation of Debt Securities d. Yields and Interest Rate Risk
e. Interest Rate and Debt Investments
f. Credit Exposure and Debt Investments g. Concentration Risk h. Passive Investments in Debt

Investment & Risk Management: Alternate Assets

a. **Gold**
  i. Role of Gold
  ii. Gold Investment Routes
  iii. Rupee returns from Gold
b. **Real Estate**
  i. Role of Real Estate
  ii. Real Estate Investment Routes
  iii. Real Estate Indices

Investment Products & Services

a. Derivatives
  i. Futures
  ii. Options
b. Mutual Fund
c. Venture Capital / Private Equity Funds
d. Hedge Funds e. Structured Products

f. Portfolio Management Services (PMS)

Investment Evaluation Framework

a. Risk-Return Framework
b. Risk
  i. Standard Deviation
  ii. Beta
c. Risk Adjusted Returns
  i. Sharpe Ratio
  ii. Trey nor Ratio
  iii. Alpha
d. Invest Classification Scheme for Investment Products

Risk Profiling & Asset Allocation

a. Risk Profiling
b. Why Asset Allocation?
c. Strategic Asset Allocation
d. Tactical Asset Allocation
e. Fixed Asset Allocation
f. Flexible Asset Allocation
g. Asset Allocation Returns in Equity and Debt
  i. Fixed Asset Allocation with Annual Re-balancing
  ii. Flexible Asset Allocation
h. Asset Allocation Returns in Equity, Debt and Gold
  i. Fixed Asset Allocation with Annual Re-balancing
  ii. Flexible Asset Allocation i. Allocation to Speculation
j. Diversification in Perspective

Risk Management through Insurance

a. Risk Assessment
b. Life Insurance
c. Health Insurance
d. General Insurance
e. Safeguards in Insurance

Elements of Taxation

a. Previous Year and Assessment Year
b. Gross Total Income
c. Income Tax Slabs
d. Advance Tax
e. Tax Deducted at Source (TDS)
f. Exempted Income
g. Deductions from Income
i. Section 80C
ii. Section 80CCC
iii. Section 80CCD
iv. Section 80D
v. Section 80E
vi. Section 80GG
h. Long Term and Short Term Capital Gain / Loss
i. Speculation Profit / Loss
j. Capital Gains Tax exemption under Section 54EC
k. Capital Gains Tax exemption under Section 54F
l. Setting Off & Carry Forward

Taxation of Investment Products

a. Dividend Tax / Tax on Income Distributed by Mutual Fun
b. Securities Transaction Tax (STT)
c. Capital Gains Taxation
d. Taxation of Fixed Deposits and Fixed Maturity Plans
i. Fixed Deposits
ii. Fixed Maturity Plans (FMP) e. Dividend and Growth Options in Mutual Fund schemes f. Wealth Tax

Estate Planning

a. Background
b. Assets & Liabilities
c. Nomination
d. Inheritance Law
e. Will

f. Trust

Kindly pay the course fee in the below mentioned account :-

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