AMITY UNIVERSITY
UTTAR PRADESH

L	T	P/S	SW/FW	TOTAL CREDIT UNITS
3	-	-	-	3

Course Title: WEALTH MANAGEMENT

Course Code: **FIBA719** **Credit Units: 03**

Course Objectives: The students will be exposed to various facets of Personal Financial Management specially for High Net Worth Individuals. After the course, the students will be able to work as Relationship Manager/ Personal Financial Advisors in Banks/ NBFCs.

Pre-requisites: Student should have the basic knowledge of financial planning

Student Learning Outcomes:

- Analyse the factors that need to be considered when advising a High Net Worth client.
- Evaluate a client's needs, assess their options, develop solutions and justify recommendations.
- Analyse the core services of a wealth management division.
- Analyse alternative investment strategies with reference to empirical evidence.
- Investigate contemporary issues that impact upon the wealth management service and assess their relevance.

Course Contents/Syllabus:

	Weightage (%)
Module1	
ABC of the Indian Financial and Investment Industry- Basic Concepts,, The Financial System, Features of Securities and Financial Markets in India- Flow of Funds(Chapter 1) . Participants in the Indian Finance System, Retail Financial Services, Wholesale Financial Services,, Investment Banks, Fund Managers, Stock Brokers, Insurance,(Chapter 2)	**10**
Module II:	
Indian Economic Environment- Indian Economy, Economic Policies and Macroeconomics, Business Cycles, Multiplier Model (Chapter 3)	**20**

Module III:	
Financial Counseling Basic Communication Principles, Attending and Listening Skills, Understanding and meeting client marketing of Financial Services,	**20**
Module IV	
Tools for Financial Planning- Planning with Personal Financial Statements- Time Value for Money, Tax Concepts for Planning (Part I Personal Finance) Personal Investing, Equity Stocks,, Debts, Bonds, Mutual Funds,, Asset Allocation (Part 5 of Personal Finance)	**20**
Module V	
Retirement and Estate Planning, Drafting of a Will, Types, Legal Frame Work, Administration of Will, Execution of a Will (Chapter 9 of IIBF)	**25**
Module VIII	
Beyond Class Room ……. A student centric module wherein students will be required to READ, COMPREHEND, PRESENT LEARN, & DISCUSS Articles/ Reports etc. as identified / selected by them OR core faculty on matters relating to Banking.	**5**

Pedagogy for Course Delivery:

- Lectures
- Assignments
- PPT's
- Case Study's
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Assessment/ Examination Scheme:

Theory L/T (%)	Lab/Practical/Studio (%)	End Term Examination
100		**70**

Theory Assessment (L&T):

					End Term Examination
Components (Drop down)	**Class Test**	**Presentation**		**Attendance**	
Weightage (%)	10	15		5	70

Text & References:

- Introduction to Financial Planning: IIBF Taxmann
- Personal Finance: Jeff Madura, Pearson Education