Dr. V. N. Bedekar Institute of Management, Thane
Teaching Plan (MMS/PGDM) - Academic Year (2016-2017)

Programme Name: MMS / PGDM:	MMS		
Name of the Course:	Wealth Management		
Maximum marks:	100	No. of Sessions:	15
Name of the Faculty:	CA Vikram Menda		
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Weblink:	N.A.		

Learning Objectives:

- India, as an economy, has embarked on a high growth trajectory which results in higher GDP with higher disposable income in the hands of individuals. This, coupled with India's growing interaction with developed nations, has exposed Indians to the global financial service standards.
- An MBA (Finance) needs to have an understanding of the various Wealth Management Services and should be able to render world class wealth management solutions to affluent clients with the highest standards of integrity.
- In this subject we will start from the basics of Financial Planning, cover the practical aspects of various financial products and investment solutions available in the real market, and also analyse the pros and cons of each of these.
- At the end of the course, the students would be able to design investment portfolio of HNI and ultra HNI clients by understanding their return expectations, risk appetite, investment horizon, etc.

Reference Books:

- Wealth Management – Harold R Evensky
- CFP Notes on Wealth Management

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Plan:

<table>
<tr><th>Session No</th><th>Topics to be covered</th><th>Books referred/ Recommended/ References-Print/Articles/ News/Research papers</th><th>Learning outcomes</th><th>Evaluation of Students understanding by MCQs, Quiz, Short Test</th></tr>
<tr><td>1</td><td>Introduction to Wealth Management</td><td rowspan="15">1. Wealth Management – Harold R Evensky
2. CFP Notes on Wealth Management
3. Business journals and newsletters
4. Economic Times and Mint newspapers</td><td rowspan="15">The students will have a practical understanding of the various Investment products and solutions available in the market.</td><td rowspan="15">To ensure better understanding among students, we shall have:
✓ Class Participation
✓ Assignments
✓ Internal tests
✓ Final Exams</td></tr>
<tr><td>2</td><td>Life-cycle Financial Planning</td></tr>
<tr><td>3</td><td>Ratio Analysis + Presentations</td></tr>
<tr><td>4</td><td>Return Measurement</td></tr>
<tr><td>5</td><td>Risk measurement and management</td></tr>
<tr><td>6</td><td>Investment Vehicles</td></tr>
<tr><td>7</td><td>Insurance Analysis</td></tr>
<tr><td>8</td><td>Investment Portfolio Management</td></tr>
<tr><td>9</td><td>Real Estate Planning</td></tr>
<tr><td>10</td><td>Retirement Planning</td></tr>
<tr><td>11</td><td>Non-traditional Investments – PE, VC, etc.</td></tr>
<tr><td>12</td><td>Portfolio Management</td></tr>
<tr><td>13</td><td>Case Studies</td></tr>
<tr><td>14</td><td>Internal Assessment</td></tr>
<tr><td>15</td><td>Case Studies</td></tr>
</table>

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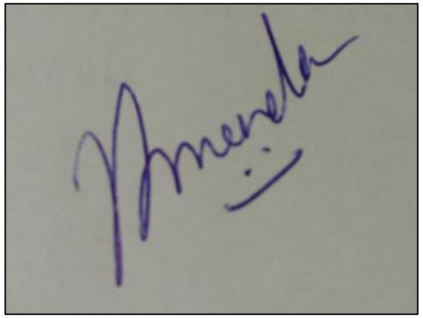
Practical Approach: Other activities (Atleast 4 distinct activities)

Sr.	Activity Name	Topic Covered	Learning outcomes	Source
1	Case Studies	Client profiling & Portfolio Management	Practical application of theory concepts	Real-life case studies
2	Practical Assignments	Real life problem solving		Financial websites
3	Newspaper Reading	Current Affairs	Practical understanding of global affairs	Newspapers & magazines
4	Group Discussion	Different investment products and their pros and cons	Subject clarity and improvement in communication skills	Financial websites
5	Videos / Simulation	Videos on Wealth Management	Practical understanding	Online

Evaluation:

I) Internal:

Component	Details	Marks
Class Test	Test covering concepts discussed in class	10
Class Participation	General interaction among students in the class	10



Signature of Faculty **Signature of the Co-ordinator**