

VPM's
DR VN BRIMS, Thane
Programme: MMS (2014-16)
Forth Semester Examination April 2016

Subject	Wealth Management		
Roll No.		Marks	60 Marks
Total No. of Questions	7	Duration	3 Hours
Total No. of printed pages	1	Date	11.04.2016

Note: Q1 is compulsory and solve any FOUR from the remaining SIX questions.

Q1) 20 Marks (Compulsory): Explain the following terms in one or two sentences:

- (i) Wealth.....(2)
- (ii) Estate.....(2)
- (iii) Commodities.....(2)
- (iv) Retirement Planning.....(2)
- (v) Private Equity.....(2)
- (vi) Private Banking.....(2)
- (vii) Durable Power of Attorney.....(2)
- (viii) Living Trust.....(2)
- (ix) Annuity.....(2)
- (x) Pension Fund.....(2)

Q2) Any two from (a) or (b) or (c) ————— (5x2) = 10 Marks

- (a) What is wealth management? What are its features?.....(5)
- (b) Briefly outline the scope of wealth management.....(5)
- (c) Discuss in brief the process of financial planning.....(5)

Q3) Any two from (a) or (b) or (c) ————— (5x2) = 10 Marks

- (a) Discuss the features of private banking.....(5)
- (b) Briefly outline the business models of private banking.....(5)
- (c) Discuss the customer profile of private banking.....(5)

Q4) Any two from (a) or (b) or (c) ————— (5x2) = 10 Marks

- (a) Discuss the steps in estate planning.....(5)
- (b) Briefly outline the benefits of estate planning.....(5)
- (c) What are the objectives of retirement planning.....(5)

Q5) Any two from (a) or (b) or (c) ————— (5x2) = 10 Marks

- (a) What are the features of private equity investing?.....(5)
- (b) Discuss the advantages of private equity investing.....(5)
- (c) Briefly outline the disadvantages of private equity investing.....(5)

Q6) Any two from (a) or (b) or (c) ————— (5x2) = 10 Marks

- (a) What are the features of real estate investing?.....(5)
- (b) Discuss the advantages of real estate investing.....(5)
- (c) Briefly outline the disadvantages of real estate investing.....(5)

Q7) Any two from (a) or (b) or (c) or (d) ————— (5x2) = 10 Marks

- (a) National Pension Scheme.....(5)
- (b) Reverse Mortgage.....(5)
- (c) Will.....(5)
- (d) Features of Commodity Investing(5)