भारतीय बीमा संस्थान
INSURANCE INSTITUTE OF INDIA
कॉलेज ऑफ इन्श्योरेन्स
COLLEGE OF INSURANCE

# Virtual Training Session on Personal Financial Planning and Role of Insurance (CVT – PFP&LI) – 1st December 2021


Dreaming and aspiring to achieve financial dreams is natural for any individual. The needs and financialgoals change from time to time depending upon thelife cycle. Resources at the disposal of any individual are scarce. There are many types of investments and returns there from are different. Any person likes to have optimal utilisation of his earnings and savings. Tax provisions in case of individuals play an important role in disposal of individual's income. Time value of money and power of compounding play an important role in Investment Management of Personal Financial Planning. This will enable a person in maximisation or wealth and fulfilling the financial objectives. Savings through Life Insurance helps in building up corpus through accumulation with risk cover. In addition, one has to factor-in uncertainties like death risk and morbidity risk and the risk of loss of assets, which will have impact on the achievement of one's dreams and that of family**.** Life Insurance and Health Insurance are the ideal solutions for covering the risks arising due to early death of a person and risks relating to morbidity like incurring large medical expenses, loss of earnings, etc. We have general insurance products to cover the losses due to damage of assets. In financial planning of an Individual the Insurance solutions play an important role.

Keeping all these factors in view an individual has to plan his finances in such a way that he achieves his financials goals smoothly and effectively withstanding all the life risks.

COI has created ***'Virtual Training (CVT) Rooms'*** as a cost-effective mechanism for participants to equip themselves academically at their respective locations.

**Programme Objectives:** This programme deals with how a person has to do his personal financial planning effectively keepingin view the various financial instruments available, the time value of money, taxation provisions of insurance and relating these goals to Insurance.

**Participants Profile:** Executives of Insurance Companies, Financial Institutions and those who are interested in learning personal financial planning.

| Duration | Date | Time (IST) | Hours |
|---|---|---|---|
| **One Day** | 1st December 2021 | 10.00 hrs. - 13.00 hrs. | 03.00 Hours |

**Course Fees: Rs.1770/-** (Rs.1500/- + 9% CGST + 9% SGST)

**How to enroll: Click here for Registration** and for any help/queries please mail to college_insurance@iii.org.in

**Certificate of Participation**: Online Certificate in PDF format will be issued to all the participants.

**Programme Coordinator: Mr. P.K. Rao, Faculty** (Email id: pkrao@iii.org.in, Mob.no. +91 9819157501)

| **For enrolment and technical support call / whatsApp on** | **Name** | **Mobile No.** | **Name** | **Mobile No.** |
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