

College of Insurance
Insurance Institute of India, Mumbai
Personal Financial Planning
Program ID: CPC9
(From: 21st to 22nd September, 2020)

Relevance of the Program:-

Financial Planning is a process of identifying life goals and translating these life goals into financial goals and managing the finances in a way that will help achieve these goals. It will also serve as a tool to plan for unexpected financial eventualities in life. It involves the assessment of one's net worth, present and future sources of income, estimating future financial needs and working towards meeting those needs through proper management of finances and ultimately achieving the goals. This requires a Comprehensive Financial Planning which includes Insurance Planning, Investment Planning, Retirement Planning and Tax Planning.

Financial planning has time value. Timely planning and monitoring is required for achieving the desired goals. To make planning more effective one should have a thorough knowledge about the various financial instruments available in the market and also an understanding of about the financial markets. One should also know the risks associated with the various financial instruments. In addition to this, knowledge of the insurance products of Life insurance, Health Insurance and General Insurance will have an added advantage in managing risk in financial planning. Time value of money plays an important role in personal financial planning.

It is essential for every individual to have a personal financial plan regarding earning, saving, investing and covering risk. It would not be overemphasizing their point if we were to say that every individual requires an effective financial planning programme in place. This should start from the moment one starts earning.

Keeping this in view we planned a two days program Personal Financial Planning. The details of topics proposed to be covered are given below. The faculty include Certified Financial Planners and Accountants.

Program Content:-

Topics Covered:-

- Life cycle needs and personal financial goals
- Risk Management
- Financial Instruments and Equity Instruments - Pros and cons
- Time value of money
- Risks associated with Financial Instruments
- Insurance products and Pension Products
- Comprehensive Planning and Monitoring.
- Retirement planning

Course Coordinator:-

Mr P K Rao – 022-26544203 Email: pkrao@iii.org.in

Program Duration & Timing: -

2 days & from 10.00 a.m. to 05.00 p.m.

Course Fees:-

- **Participants requiring residential facilities: Total amount Required –Rs. 11800/-i.e. (Rs. 10000/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.

Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.

- **Non-residential participants: Total amount Required –Rs. 8496/-i.e. (Rs. 7200/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material and day boarding (i.e. tea/coffee during tea breaks and lunch for actual days of training).

Training Venue:-

Please follow below link / QR Code for Training Venue

<https://qr.go.page.link/qs2Qb>



Parking Facility:-

Public parking available at 5 minutes walking distance (Behind US Consulate).

Respond to:-

Ms E. D'souza	college_insurance@iii.org.in	022-26544210
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Mr P M Tare		022-26544251
Ms N B Bagde		022-26544234

**College of Insurance
Insurance Institute of India,
G Block, Plot No. C – 46, Near American Consulate, Bandra Kurla Complex,
Bandra (East), Mumbai – 4000051**

Information for Registration

Registration:-

- To register online, visit menu Enrolment – Online Enrolment on website www.coi.org.in else follow link - <http://www.coi.org.in/web/guest/programme-calendar>
- For offline registration, mail us at college_insurance@iii.org.in and please see below details for bank transfer.

Name of the Beneficiary:-	Insurance Institute of India
Name of Bank & Address :-	Axis Bank Ltd, Fort Branch, Jeevan Prakash Building, Sir P M Road, Mumbai – 400001.
Account No.:-	0040 10100 143462
IFSC Code:-	UTIB 000 000 4
MICR Code:-	400211002
Swift Code:-	AXISINBB004

- The confirmation of registration for the program will be subject to receipt of payment before the commencement of the program.

Training Venue:-

Insurance Institute of India, (College of Insurance), G Block, Plot No. C – 46, Near American Consulate, Bandra Kurla Complex, Bandra (East), Mumbai – 4000051

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Nomination Form

- 1) Participant Name: _____
- 2) Program Name: _____
- 3) Program Period: _____
- 4) Address: _____

- 5) Educational Qualification: _____
- 6) Date of Birth: _____
- 7) Position Held: _____
- 8) Mobile No: _____
- 9) Telephone No.: _____
- 10) E-Mail: _____
- 11) Alternate E-Mail: _____
- 12) Sponsoring Organisation: _____
- 13) Food preference: Vegetarian Non-Vegetarian
- 14) Hostel Facility Required: Yes No
- 15) Details of Fee Paid: Cheque / D.D. No. _____ dt. _____
Drawn on _____ Bank, for Rs. _____

Please
affix your
photograph
here

Signature & seal of the authority
of the Sponsoring organisation

Signature of the Participant

*Name of Co-ordinator: _____
Mobile No: _____ Tel. No.: _____
Email-Id.: _____ Company Name: _____

*This column is mandatory for those participants who are sponsored by company.