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

Virtual Training Session on Personal Financial Planning and Life Insurance - (CVT-PFP&LI) – Program ID – CPL2 (6th May 2022)

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 facilitate to 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 planning and management of finances and ultimately achieving the goals. A Comprehensive Financial Planning includes Insurance Planning, Investment Planning, Retirement Planning and Tax Planning.

Money has time value and compounding effect if properly invested. 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 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 is essential 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, if we were to say that every individual requires an effective financial planning program in place. This should start from the moment one starts earning.
Keeping this in view we planned a one day three hour program on Personal Financial Planning. The details of topics proposed to be covered are given below. The faculty include Certified Financial Planners and Accountants.

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

Program Objectives:

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

Participant's Profile: The virtual Program is designed for Executives from Health, General and Life Insurance Companies, Brokers, IMF, Hospitals, TPAs.

Duration	Date	Time (IST)	Hours
One Day	**6th May 2022**	**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.

Program Coordinator:

Mr. Krishnamohan Y, Faculty (Email id: ykmohan@iii.org.in, Mob.no. +91 8879688027)

For enrolment and technical support call / whatsApp on	Name	Mobile No.	Name	Mobile No.
	Mr. Prashant Tare	+91 93719 70647	Ms. Shilpa Vaidya	+91 98691 54850
	Ms. Ashlesha Dalvi	+91 96642 69027	Ms. Tanuja S Jagavkar	+91 98203 90994
	Ms. Nilambari Bagde	+91 99208 83627		