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) - 27th August 2021

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 risks in life. It involves 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 thorough knowledge about the various financial instruments available in the market and also understanding about the financial markets. One should also know the risks associated with the various financial instruments. In addition to this, knowledge about the insurance products of Life insurance, Health Insurance and General Insurance will have an added advantage in managing risk in the 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, covering risk in spite of their busy preoccupations. It may not be overemphasizing if we say every individual require an effective financial planning. This should start moment a person starts earning. Keeping this in view we planned a one day programme on Personal Financial Planning. The details of topics proposed to be covered are given below.

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

Programme Objectives:

- Life cycle needs and personal financial goals
- Time value of money
- Risk Management
- Life Insurance products and Pension Products
- Comprehensive planning and monitoring

Participant Profile:

Executives working for Insurance Companies, Financial Institutions and persons who are interested in learning personal financial planning vis-à-vis Life Insurance.

Duration	Date	Time	Hours
One Day	27th August 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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