



## Financial Planning and Wealth Management Certificate Online – F104 100 Hours

These courses are designed to prepare students to do paraprofessional work in investment companies, banks, insurance companies, or corporations, or to be an assistant to financial planners. It does not train students for the Certified Financial Planner certification. However, comprehensive distance learning courses cover the key details of the financial planning process.

The key knowledge areas are:

- Financial Planning Fundamentals
- Financial Planning Skills
- Retirement Planning
- Tax Planning
- Insurance Planning
- Estate Planning
- Money Markets
- Mutual Funds

Financial Planning Fundamentals	Introduction to Financial Planning Analyzing the Resources of a Person Introduction to Taxation and Cash Flows Basic Concepts in Financial Planning Time Value Diversification Investment Timing Insurance Concepts
Financial and Investment Products	Asset Classes Managing Investments Equity Fixed Income Securities Derivatives Mutual Funds Superannuation Building an Investment Portfolio Investment Strategies
Financial Planning Skills	Client discussions The financial planning process Analysis of client's resources and needs Gap analysis and asset allocation Setting investment objectives & investment constraints Presenting strategies and recommendations Goal Achievement, and signoff



Tax Planning	<ul style="list-style-type: none"> <li>Tax and financial planning</li> <li>Taxation of Personal Income</li> <li>Salary Structure and Fringe Benefits Tax</li> <li>Tax Management Strategies</li> <li>Capital Gains Tax</li> <li>Tax Deductions, Offsets and Exemptions</li> <li>Tax Planning</li> </ul>
Retirement Planning	<ul style="list-style-type: none"> <li>Retirement needs analysis</li> <li>Social security</li> <li>Types of Retirement Plans</li> <li>Investment considerations for retirement plans</li> </ul>
Insurance Planning	<ul style="list-style-type: none"> <li>General Concepts</li> <li>Insurance needs analysis</li> <li>Property, casualty and liability insurance</li> <li>Health insurance</li> <li>Life insurance</li> <li>Selecting an insurance policy</li> <li>Tax aspects of insurance</li> <li>Annuities</li> </ul>
Estate Planning	<ul style="list-style-type: none"> <li>Overview of estate planning</li> <li>Methods of property transfer</li> <li>Documents for estate planning</li> <li>Insurance and estate planning</li> <li>Wills, deaths, and taxes</li> <li>Preparing an estate plan</li> <li>Valuation issues</li> </ul>
Money Markets	<ul style="list-style-type: none"> <li>Overview to Money Markets</li> <li>Instruments of Money Markets</li> <li>Arithmetic for Money Markets</li> <li>Money Market Deposits</li> <li>Certificates of Deposit</li> <li>Repurchase Agreements (Repos)</li> <li>Treasury Bills</li> <li>Bills of Exchange</li> <li>Commercial Paper</li> </ul>
Mutual Funds	<ul style="list-style-type: none"> <li>Mutual Funds - The Concept</li> <li>Structure and Constituents of Mutual Funds</li> <li>Various Types of Mutual Fund Products</li> <li>Management of Bond Fund Portfolio</li> <li>Management of Equity Fund Portfolio</li> <li>Accounting and Valuation</li> <li>Evaluation of Performance of Mutual Funds</li> <li>Prospectus and Annual Report of Mutual Fund</li> <li>Regulations of Mutual Funds Industry</li> <li>Trends in Mutual Funds Industry</li> <li>Measurement Tools</li> </ul>



Exhaustive theoretical material supplemented with contemporary case studies.

Learner friendly courses with:

- > Formulae, definitions and concise summaries
- > Interactive simulations
- > Solved examples, practice exercises and quizzes
- > Mock exams from proprietary database
- > Timed tests in exam format
- > Personalized results for self assessment
- > Glossary, FAQs, Pocket Reference
- > Valuable reference extracts

Other features include:

- > E-mail subject-matter expert
- > Online with 24x7 customer support