



**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Virtual Training Session on Comprehensive Financial**  
**Planning Series-Part 4 : Financial Planning : Focus on Estate**  
**Planning (CVT-CFPS), (On: 10<sup>th</sup> January, 2025)**

**Program Concept and Objectives:**

Financial Planning is a continuous pursuit of meeting both short term as well as long term goals with prudence. It encompasses Insurance Planning, Retirement Planning, Investment Planning, Tax Planning and Estate Planning. Financial Planning process is quite comprehensive and all-inclusive and will provide end to end solutions to customers in various life stages. Customers are nowadays well informed with so much information available on the Internet and their expectations are very high from Advisors. They look for professionals with domain expertise. Estate Planning as part of Financial Planning is also significant as it enables

- Offer suitable guidance to customers on legacy planning
- Build a professional image as Financial Planner
- Have a Customer for Life

With this background in view, this Series of programs has been designed to comprehensively cover Individual Financial Planning, this Part 5 focusing on Estate Planning.

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

**Key Takeaways from the Program:**

The program participants will have knowledge and insight into the following

- What is Estate Planning?
- Parties Involved in Estate Planning
- Importance of Estate Planning
- Types of Estate Planning Trusts
- MWP Act
- Concept of HUF
- Wills/Nominations

**Participant Profile:**

The course is designed for Sales Managers, Professional Advisors of Life Insurance Companies, Club Members and MDRT Probable.



**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Virtual Training Session on Comprehensive Financial**  
**Planning Series-Part 4 : Financial Planning : Focus on Estate**  
**Planning (CVT-CFPS), (On: 10<sup>th</sup> January, 2025)**

**Program Coordinator:**

Dr. Ramesh Kumar Satuluri

022-69654263

Email: [ramesh@iii.org.in](mailto:ramesh@iii.org.in)

**Program Duration & Timing:**

1 day & from 10.00 a.m. to 01.00 p.m.

**Program Fees:**

The Program Fees: Rs.1770/- (Rs. 1500 /- + 9% CGST + 9% SGST)

**How to Enroll:**

Please click the below link to register the program

[https://www.insuranceinstituteofindia.com/o/COI\\_WebPortal/cmc/eventDetails?eventid=2282](https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2282)

**Certificate of Participation:**

Online Certificate in PDF format will be issued to all the participants.

**Program Team:**

Ms. Nilambari Bagde	<a href="mailto:college_insurance@iii.org.in">college_insurance@iii.org.in</a>	022-69654234
Ms. Yogeeta Kulkarni		022-69654255
Mr. Sujay Mahadik		022-69654251
Ms. Akshara Nagpal		022-69654266
Ms. Jayashree Salian		022-69654249
Ms. Mrunal Satam		022-69654216