College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Comprehensive Financial Planning –Focus Insurance Planning (CT-CFP)
(From: 24th to 25th February, 2025)

Program Concept and Objectives:

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 the 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. This requires a Comprehensive Financial Planning which includes Insurance Planning, Investment Planning, Retirement Planning and Tax Planning.

No financial planning is complete until it includes planning for contingencies of uncertain events during one's life. Personal Risks like early death, disability, Morbidity, Risks pertaining to log living requires mitigation. Life Insurance is an effective solution for the aforesaid risks. Life Insurance is also a saving tool which can be used for creating corpus to meet future financial goals. Therefore, knowledge of the insurance products of Life insurance, Health Insurance and General Insurance is essential in managing risk in financial planning.

Keeping this in view The College of Insurance has designed a two days program on Personal Financial Planning and the role of Life Insurance with an objective to create understanding about all elements of personal financial planning and how different life insurance product categories serve as effective tools to manage the various risks contingent upon human life including product categories.

Key Takeaways from the Program:

The participants of the program will gain knowledge and insight into the following

- Life cycle needs and personal financial goals
- Personal Risks like Early Death, Disability, Morbidity, etc.,
- Risk Management and Risk Management Methods.
- Time value of money
- Risks associated with Financial Instruments
- How to make your Personal Financial Planning path risk proof
- Insurance products and Pension Products
- Comprehensive Planning and Monitoring
- Retirement planning

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Comprehensive Financial Planning –Focus Insurance Planning (CT-CFP)
(From: 24th to 25th February, 2025)

Participant Profile:

Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisers and the persons who are interested in financial planning vis-à-vis Life Insurance.

Program Coordinator:

Dr. Ramesh Kumar Satuluri 022-69654263 Email: ramesh@iii.org.in

Program Duration & Timing:

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

Program 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. 4248/- 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).

Payment Terms and Conditions:

1) The payment should be received by the College of Insurance before the commencement of the program.
2) The confirmation of registration for the program will be subject to receipt of payment.

3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB0000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Branch - Fort Branch Address - Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai – 400001.

4) For online payment mode by following the below link

https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2314

Program Venue, Location and Parking:

Program Venue:

College of Insurance,
Insurance Institute of India,
C-46, G-Block, Bandra-Kurla Complex,
Mumbai - 400 051 India.

Please follow the link / scan QR Code for training venue.

https://qrgo.page.link/qs2Qb

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

Program Team:

Ms. Nilambari Bagde		022-69654234
Ms. Yogeeta Kulkarni		022-69654255
Mr. Sujay Mahadik	college_insurance@iii.org.in	022-69654251
Ms. Akshara Nagpal		022-69654266
Ms. Jayashree Salian		022-69654249
Ms. Mrunal Satam		022-69654216