College of Insurance
Insurance Institute of India, Mumbai
Virtual Training Session on Comprehensive Financial Planning Series-Part 2 : Financial Planning : Focus on Retirement Planning (CVT-CFP)(On: 6th September, 2024)

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. Financial Planning is also significant as it enables.

- Increase in the Average Ticket Size
- Successfully close the HNI calls with higher conversion
- Cross Sell and Upsell to the existing customer base
- Increase referral and work on repeat business
- 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 2 focusing on Tax Planning.

COI has created ***'Virtual Training (CVT) Rooms'*** to conduct training program in a cost-effective manner for participants to equip themselves academically at their respective locations.

Key Takeaways from the Program:

The program participants will have knowledge and insight into the following

- Discuss about provisions of Old and New Tax Regime
- Provisions relating to various deductions under Section 80C to 80U
- Provisions pertaining to exemptions under section 10
- Brief on NRI Taxation and relevant sections
- Updated changes on taxation pertaining to insurance plans
- Case studies to firm up the understanding
- Demonstration of Calculations with the usage of TVM Tables and Excel

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Participant Profile:

Sales Managers, Professional Advisors of Life Insurers, Club Members and Potential MDRTs.

Program Coordinator:

Dr Ramesh Kumar Satuluri 022-69654263 Email: 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. 1,500/- + 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=2186

Certificate of Participation:

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

Program Team:

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