College of Insurance
Insurance Institute of India, Mumbai
Virtual Training Session on Comprehensive Financial Planning Series-Part 3 : Focus on Investment Planning (CVT-CFP), (On: 6th November, 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 3 focusing on Investment 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

- Present Value/Future Value/Inflation Adjusted Rate of Return
- Various classes of Investment Assets
- The Basic features of Investment
- Evaluation of the Various Investment Assets
- ULIP as an investment product
- Monitoring of Investments
- Valuation of Investment
- Return on investment
- Churning of Investments for higher return on the portfolio/Risk Measurements

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Participant Profile:

The course is designed for Sales Managers/Relationship Managers/Wealth Managers from Insurance Companies/Corporate Agents/Banks/Broking Firms.

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=2236

Certificate of Participation:

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

Program Team:

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