

## SESSION PLAN

### **XAVIER INSTITUTE OF MANAGEMENT, BHUBANESHWAR**

Name of the course: Certified Programme in Financial Services and Wealth Management

### **ADVANCED WEALTH MANAGEMENT**

Academic Session: 2010

Faculty Member: Prof. Vineet Gupta

### **COURSE DESCRIPTION**

The course deals with the introduction to "wealth" concept, its global position, client education, goals and concerns, asset classes and wealth management strategies.

### **COURSE OBJECTIVES**

At the end of module, the student should be able to understand

- the wealth aspects
- its global position and situation in Indian context
- wealth management strategies

### **DETAILED SESSION PLAN**

#### **SESSION 1**

Course background

Internal assessment criterion

Lecture approach

Concepts and Definition of wealth

Global Wealth

Discussion on Global wealth reports

- Credit Suisse
- Merrill Lynch & Capgemini

Wealth Management Process

Phases in wealth management

Wealth management in Indian context

Recent Citibank scam – misuse of wealth management

#### **SESSION – 2**

Client Goals & Constraints

Client profiling

Goal setting

Prioritisation

Time Dimension

Data Gathering

Constraints

Client Education

Investment Process

ROI

Market timing fallacy

Review of Asset classes with more emphasis in bold items

Equity

Debt

Derivatives

**Structured products**

Real Estate

Mutual funds

**Hedge Funds**

Commodities

Art

### **SESSION – 3**

Estate planning

Need

Tools

Management of "WILL"

Case Studies - Presentations

### **SESSION – 4**

Case Studies ..Contd.

Wealth Management strategies

Philosophies of wealth creation

Quiz based on MCQ

### **PEDAGOGY**

The teaching methodology entailing lectures and presentation is extremely interactive and requires active class participation. It is intended to discuss a number of real life situations to make conceptual understanding simple and clear.

### **SUGGESTED READING**

#### **Text**

Wealth Management by Dun & Bradstreet, TMH Edition

#### **Reference**

Personal Financial Planning

Theory & Practice

Debbie Harrison, Pearson Education

Practical Investment Management

Robert A. Strong, Thompson South - Western

#### **Magazines and Journals**

Financial Times

Capital Market

Dalal Street

The Economic Times

Business Line

Financial Express

Wall Street Journal

**Websites**

[www.nseindia.com](http://www.nseindia.com)

[www.bseindia.com](http://www.bseindia.com)

[www.sebi.gov.in](http://www.sebi.gov.in)

[www.capitalmarket.com](http://www.capitalmarket.com)

**Evaluation Method & Weightage:****Internal Assessment (30 Marks)**

MCQ : 15 M

Presentations : 15 M

**End Term Assessment (70 Marks)**