

## Certificate Course in Financial Planning

# Financial Planning



**"Planning is bringing the future into the present so that you can do something about it now."**

### **Objective**

It provides outline and direction for Financial Future Goal. Financial planning helps to understand Perspective Financial goals better in terms of why there is need to achieve these goals and how they Impact other aspects of life and finances. Planning encourages to manage inflation near future and leads better utilization of Available fund. Students will understand what it means to be a financial planning professional and to be contributing citizens and valued members in the financial planning industry.

### **Course Content**

- Introduction to Financial Planning
- Portfolio Management
- Insurance Planning and Risk Analysis
- Investment planning
- Taxation and Real Estate Planning

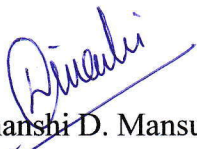
### **Scope**

Financial planning asks individuals and businesses to set goals for their future. These goals could require only a few years to complete, such as saving for a down payment on a house or paying off student loans. Long-term goals, like saving for retirement, also need frequent monitoring to ensure individuals stay on track with their aim. Individuals or companies may use investment analysis to find stocks or bonds that help their savings grow over time.

### **Career opportunities and Employability**

This rising demand for financial advisors or investment advisors makes it one of the best careers to go for now. A career as a financial advisor or investment advisor is best suited for people who truly want to help and make a difference in the life of others.

- Financial analyst
- Investment manager
- Portfolio manager
- Financial and Insurance Advisor
- Financial Consultant and Tax Advisor

  
Dr. Himanshi D. Mansukhani  
Course Coordinator



  
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