Programme Description Document Template

Course Name	**INVESTMENT ADVISORY SERVICES MODULE**
Course Name as on Certificate	**PROGRAMME IN INVESTMENT ADVISORY SERVICES**
Certificate Type	Certificate of Completion by IIT-MADRAS
Certificate Issued by	IIT MADRAS
Course Objectives	1. To provide an overview of Indian Financial System 2. Roles & Responsibilities of various Participants, Intermediaries & Regulators in functioning of Indian Financial System 3. To explain Financial Planning, Its process and different strategies in detail 4. Understand in detail about Life Insurance, General Insurance & Risk Management practices 5. Know about Retirement Needs, Planning process, Pension Products, Employee benefits, Superannuation and regulatory framework that guide them 6. What are different types of Asset Classes, Investment Products, Investments Strategies. 7. What is Portfolio Management 8. Different ways of measuring and analysis of returns 9. Know Taxation rules guiding different products 10. What is Estate Planning, its process and different strategies
Eligibility	A bachelor's degree from a recognised Indian University or students pursuing graduation
Pre Requisites	Basic understanding on Indian Banking
Target Segment	• Students who are keen to build a career by working in Financial Services Domain, WealthManagement Company, Bank Or Financial Intermediary • Risk Managers • Treasury Managers • Individuals who want to manage their own Wealth • Executives who are part of BFSI and want to upgrade skill set for better career opportunities
Course Content	**See Enclosed Programme details – as Annexure 1**
Pedagogy	• The Primary method of instruction will be through Online Video Classes. • Participants can access the courses via Desktop / Laptop / Smart phone. • The lectures and content are created by Financial Market Experts, Eminent Trainers & Well known Academician who are quiet experienced. • This programme is a Compilation of Video Lectures, Mock Tests, Quiz, Group Discussions and Case Studies.

<table>
<tr><td>Assessment</td><td colspan="3">The students can assess their learning by undertaking Mock Tests, Quiz and Case Studies.</td></tr>
<tr><td>Programme Faculty</td><td colspan="3">Mrs. Rekha Ramanadhan</td></tr>
<tr><td>Duration</td><td colspan="3">50 Teaching hours and 3 hours of Case Study</td></tr>
<tr><td>Validity</td><td colspan="3">1 Year</td></tr>
<tr><td>Programme Highlights/USPs</td><td colspan="3">On successful completion of the programme, you will have
• Robust understanding of Financial Services Industry
• What different Participants, Intermediaries & Regulators work in tandem to manage the IndianFinancial Ecosystem
• The role and Importance of Financial Planning in helping an individual/Business in reaching theirFinancial Goals & Objectives
• Advice Customers on investing
• Nature of different types of Asset Classes like Equity, Debt, Bonds, Gold etc, how they work andhow are they combined to build an ideal investment portfolio
• Types of Financial Products like Mutual Funds, Insurance etc
• How Taxation impacts investment returns
• How to review investments plans by keeping goals and objectives in mind
• How Estate Planning can help in passing wealth to the next generation in the family

Other Highlights:
• Opportunity to earn a Certificate from IIT Madras.
• Lectures imparted by Eminent Academicians and practicing Industry Experts.
• Fully Online Pre-Recorded Course with online lectures that provides a “real” classroomexperience in a “virtual” environment.
• Seamless technology that can transmit lecture videos effectively at home broadbandconnection of 512 kbps.
• User friendly and easy to use technology interface. No expensive and time-consumingsoftware/hardware installations required at your end.
• Through our web portal, Students are provided access to course presentations, case studies,assignments and other reference materials as applicable for specified courses
• Learn from Anywhere – No need to travel to an institute or training centre. Learning continueseven if you are traveling or not available at any specific location. You may also learn from the comfort of your home at your convenient time.</td></tr>
<tr><td rowspan="2">Total Fees</td><td></td><td>Total Fees (Rs.)</td><td></td></tr>
<tr><td>Total Programme Fee</td><td>₹14,160 incl GST</td><td></td></tr>
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ANNEXURE 1

Proposed Course outline / programme / plan

CERTIFICATE PROGRAMME IN BANKING AND FINANCE

TABLE OF CONTENTS

CHAPTER	6	LIFE CYCLE ANALYSIS, RETIREMENT NEEDS AND FACTORS IN PLANNING
CHAPTER	7	RETIREMENT PLANNING PROCESS
CHAPTER	8	EMPLOYEE BENEFITS AND SUPER ANNUATION
CHAPTER	9	PENSION PRODUCTS
CHAPTER	10	REGULATORY FRAMEWORK OF RETIREMENT PLANS
SUBJECT	III	INVESTMENT PLANING, TAX PLANING AND ESTATE PLANNING
CHAPTER	1	INVESTMENT CONCEPTS, ASSET CLASSES AND INVESTMENT PRODUCTS
CHAPTER	2	INVESTMENT PLANNING, MEASURING AND ANALYSIS OF RETURNS
CHAPTER	3	INVESTMENT STRATEGIES AND PORTFOLIO MANAGEMENT
CHAPTER	4	REGULATORY AND PROCEDURAL ASPECTS OF FINANCIAL PRODUCTS AND SERVICES
CHAPTER	5	TAXATION ASPECTS OF WEALTH
CHAPTER	6	ESTATE PLANNING PROCESS AND STRATEGIES