

CHITKARA
UNIVERSITY



CHITKARA BUSINESS SCHOOL

Executive Education Program in
Insurance & Financial Planning

For Working professionals/self-employed (Graduates)
with minimum work experience of 3 Years





2-YEAR EXECUTIVE EDUCATION PROGRAM IN INSURANCE & FINANCIAL PLANNING

Executive Education Program in Insurance and Financial Planning is a distinctive program designed to cater to the needs of the Insurance Cohorts, Prospective Financial Planners (From Equity, Mutual Funds & Wealth Profiles), and the Housemakers/Entrepreneurs. The program is a judicious blend of Classroom Coaching, Virtual Handholding & Live Practical Exposure during the course of two years (Four Semesters/Modules).

The Program is first of its kind in India and has been designed and is delivered by Industry Experts to handhold and assist the Prospective Learners or Ready to be Experts in the domain of Wealth Management or Portfolio Management. Each of the Subjects in each semester have been carefully designed with utmost care to give an overall practical learning experience so that the Participants act and perform as soon as they are out of the class room coaching and virtual learning and in turn lessens down the learning curve and increases the delivery potential of the Participants. It aims to develop genuine Industry ready Portfolio and Wealth Managers who are experts in any and all domains of Financial Planning with sound knowledge of latest fields of knowledge.

The Program has the following Edge & Features:

- All the Subjects in the Module are delivered in Practical manner by Corporate Practitioners, so as to equip/prepare the Participants with Technical sound knowledge in handling their Clients or managing Self Portfolios.
- A thorough handholding apart from class room coaching is also provided throughout the Program to the Participants by Corporate Practitioners to make the Participants Real Markets ready.



- The Participants revisit their Old Scholarly days (College Life) by witnessing & experiencing Hostel Life, & enjoying Sports Activities apart from Regular Hectic Schedule of Studies.
- Such Program also ensures that Participants from different parts of India learn and network with other peer members to imbibe the Best practices of Diversified cultures, Thoughts, Learnings & Experiences.
- To equip the candidates with the tools and techniques useful for financial planning in today's financial and economic scenario.
- To equip the candidates with innovative models and practically woven techniques to design the Portfolio of their Clients along with apt fitment of their flagship products into such Portfolios.
- To refine the candidates' technical and interpersonal skills through the use of case studies and live projects.
- To nurture and groom the candidates in strengthening their Networking with clients based on sheer knowledge and technical skill sets.
- To transform the Insurance Agents and Sub Brokers into becoming a Complete Portfolio Advisor & Financial Planner.

Program content and topics

Executive participants of the program are trained into various aspects of Insurance and Financial Planning at different levels.

Module 1

- Fundamentals of Global Financial Markets & Institutions
- Technology for Executives
- Finance for Non Finance
- Financial Statement Analysis
- Marketing of Financial Services in Digital World
- Workshop Course on OB and Management Principles
- Basics of Insurance & Financial Planning

Module 3

- Financial Modelling
- Pitch Book Preparation
- Modern issues, Learnings and Opportunities in Insurance
- Financial Instruments & Planning
- Workshop course on Business Communication
- Team Building & Management

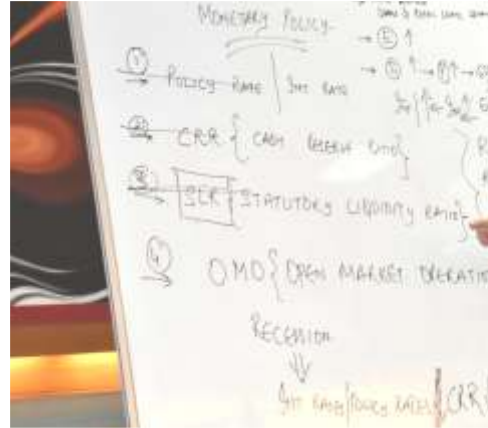
Module 2

- Marketing of Insurance Products &
- Tax Planning & Risk Management
- Estate Planning & Retirement Planning
- Legal Framework of Business
- Basics of Investment Management
- Customer Relationship Management

Module 4

- Portfolio and Wealth Management
- Derivatives, Future & Options
- Investment & Portfolio Management
- Ethics, Values and Leadership
- Financial Fraud Management
- Global Securities and Operations

The topics are delivered in various formats of class room training, workshop mode and through role plays/experiential exercises keeping in mind the demographics of working professionals.



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