



INDIAN INSTITUTE OF FOREIGN TRADE,  
(DEEMED TO BE UNIVERSITY)

DEPARTMENT OF COMMERCE,  
GOVERNMENT OF INDIA, NEW DELHI

## **Wealth Management and Financial Planning**



**IIFT BHAWAN**

**B-21, Qutab Institutional Area, New Delhi-110016**

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### **About IIFT**

Indian Institute of Foreign Trade (IIFT) was established in 1963 by the Ministry of Commerce, Government of India with the objective of imparting Management Education in International Business, conducting research on issues related to global economic environment and trade policies. It is the pioneer Institute for Capacity Building Programs and has been shaping up a plethora of executives for more than 55 years. In its journey IIFT has constantly been the 'think tank' for the Government in various functional areas and specialized verticals and has been imparting well-structured academic knowledge on Foreign Trade and International Business Management. It has been accredited by NAAC as 'A grade' Institution and has also been accredited by AACSB (Association to Advance Collegiate School of Business), a U.S. based quality accreditation and has entered in the premier league of top 15 Indian educational institutions.

### **INTERNATIONAL COLLABORATIONS**

IIFT has been successfully strengthening its relationship with regional as well as international Institutes. IIFT has strong international collaborations with the following organizations:

- Academy of International Business (AIB).
- Global Compact Network of India.
- The European Foundation for Management Development (EFMD).

### **Management Development Programs at IIFT**

IIFT offers executive education through Management Development programs (MDP). MDPs has been one of the major activities of the Institute, at the time since its inception in 1963, it was envisaged that IIFT should become a Centre of excellence for Executive Development Program in International Business, and today, it has emerged as a knowledge resource division catering to the needs of managers and executives at all levels drawn from the corporate, government and public sectors both in India and abroad.

MDP Division offers programs for ISS, IFS, IAS, IRS, ITS, PSUs ETC for the corporate sector executives and Government officers. In addition to regular training program conducted throughout the year, MDP division also conducts various certificate and Executive Development program via hybrid and online mode. In the recent past, the division has conducted a series of online program under Nirayat Bandhu Scheme of DGFT, Government of India in which above 1200 exporters / entrepreneurs across country have been provided skill based training in Export Import Business. Series of capacity building program for ITI principals and Employment exchange officers spread across country have also been conducted in order to address the existing employment gap in the country.

### **RANKINGS & ACCREDITATIONS**

The institute has achieved high rankings amongst B-Schools in India by various ranking agencies

- **The Association of Advance Collegiate Schools of Business (AACSB)**
- **National Assessment and Accreditation Council (NAAC)**
- **25th in National Institute Ranking Framework (NIRF)**
- **10th in Business Today – MDRA**
- **6th in Chronicles All India B-School Survey**
- **7th in Business World – B-School Ranking**
- **15th in Outlook – B-School Survey**
- **11th in MBA Universe B-School Ranking**
- **10th in Inside IIM MBA Rankings**

## About the Programme

The course is especially designed for the officers of the Armed Forces with an objective to help them management of wealth and sound investment planning. The programme aims at providing knowledge and skills for achieving and utilizing the resources, asset allocation, insurance and tax planning etc.

## Course Contents

S No.	Topic
1	<b>Introduction to Wealth Management and financial markets:</b> <ul style="list-style-type: none"><li>- Various instruments for wealth planning</li><li>- How Financial Markets works.</li><li>- Behavioral Aspects of individual investors and how behavior impact financial planning.</li><li>- Basics of Asset allocation</li><li>- Understanding risk and return objectives (Second income, Inflation protection, Growth or specific goals) and constraints.</li><li>- Concepts of time value of money</li></ul>
2	<b>Investment planning:</b> <ul style="list-style-type: none"><li>- Understanding Bonds, Equities and other investment markets.</li><li>- How to invest in Government and corporate, bonds and equities.</li><li>- Concepts of risk and return- Setting up market expectations.</li><li>- Fundamental and Technical analysis and strategies for investing in quality stocks at best prices.</li><li>- Mutual funds and selection models for best risk adjusted returns.</li><li>- Concept of benchmarking, fee structures and other costs involved in investing.</li><li>- Immunization and maximization of rate of return through Mutual funds.</li></ul>

3	<b>Alternative Investments:</b> <ul style="list-style-type: none"> <li>- Capital protection funds</li> <li>- REITS</li> <li>- INVITS</li> <li>- Introduction to derivatives and how they can be used as a tool for retirement planning and risk management.</li> </ul>
4	<b>Asset Allocation:</b> <ul style="list-style-type: none"> <li>- Models of asset allocation- Equities, Bonds, Gold and other instruments.</li> <li>- Rebalancing for risk management and protection of funds.</li> <li>- Benefits of diversification through correlation and regression analysis.</li> </ul>
5	<b>Insurance Planning:</b> <ul style="list-style-type: none"> <li>- Insurance market dynamics and instruments</li> <li>- Ulips, endowment and Term plans and selection of appropriate plans for wealth planning</li> <li>- How insurance is different from Investment.</li> </ul>
6	<b>Retirement planning:</b> <ul style="list-style-type: none"> <li>- Setting up and ways to achieve retirement goals.</li> <li>- Using Mutual funds, SWP, NCD, Equity dividends etc. as other source of retirement income</li> </ul>
7	<b>Estate &amp; Tax Planning</b> <ul style="list-style-type: none"> <li>- Various provision of Income tax to save taxes and generate tax free or low tax income.</li> <li>- Tax saving instruments and their risks and returns</li> </ul>
8	<b>Flip class presentations</b>

## PROGRAMME HIGHLIGHTS

- **Schedule of Classes: Monday – Friday (10 AM – 03:30 PM)**
- **Programme Fee: Rs.50, 000/- + 18 % GST = Rs.59000/- (non-refundable, after admission).**

## HOW TO APPLY

- Click on the following link to apply online : <http://docs.iift.ac.in/pilotweb/wealth/>
- Last date of applications: **20 August 2022**. Note. Please ensure all details are filled including the E- mail address. Incomplete applications will not be accepted

### Venue of the Program:

IIFT BHAWAN, B-21, Qutab Institutional Area, New Delhi – 110016

Programme Duration: 29<sup>th</sup> August to 09<sup>th</sup> September 2022

Timings: 10 AM to 03:30 PM

Tea/Coffee/Snack and Lunch would be provided during the breaks

### Program Administration

**Prof. Asheesh Pandey, Head MDP Division,  
(Programme Director)**

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