

Govt. College, Amargarh

Syllabus for Financial Planning And Wealth Management

Commerce Department

Duration: - 1 Month

Sr. No.	Topics
1.	Basics of financial planning
2.	Understanding wealth management principles
3.	Personal Finance and Budgeting
4.	Assessing personal financial goals
5.	Creating and managing budgets
6.	Investment Strategies and Portfolio Management
7.	Types of investments: stocks, bonds, mutual funds, etc.

Learning Outcomes:-

- Develop a foundational understanding of financial planning and wealth management concepts.
- Apply budgeting techniques to effectively manage personal finances and achieve financial goals.
- Design and manage investment portfolios tailored to individual risk tolerance and objectives.
- Create comprehensive retirement and estate plans considering various factors.
- Apply tax planning strategies and risk management techniques to optimize financial outcomes.



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Principal
Govt. College
Amargarh (Punjab)

• Evaluation Process:-

➤ Grading Categories

- Group Discussion (Interactive Session) 60%
- Assessments 30%
- Class Participation 10%

➤ Grading Scale

- 100-90% A
- 89-80% B
- 79-70% C
- 69-60% D
- 59-0% E

Meenu
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