

Program: Bachelor of Commerce(Economics and Analytics)				Semester: IV	
Course: Wealth Management AY: 2024-25				Course Code:	
Teaching Scheme			Evaluation Scheme		
Lecture (Hours per week)	Practical (Hours per week)	Tutori al (Hour s per week)	Credit	Continuous Assessment (CA)	Semester End Examinations (SEE)
2			2	20	30
Learning Objectives:					
<ul style="list-style-type: none"> • To know the concept, scope and significance of Wealth Management. • To understand the financial planning and various investment strategies. • To understand the concept, principles and types of insurance. • To understand retirement and tax planning concept. 					
Course Outcomes:					
After completion of the course, learners would be able to:					
<ul style="list-style-type: none"> • Understand the concept, scope and significance of wealth management. • Analysis of various Investment strategies and investment products. • Application of insurance planning, retirement planning and tax planning strategies. 					
Outline of Syllabus: (per session plan)					
Module	Description				No of Hours
1	Foundation of Wealth Management				15
2	Components of Financial Planning				15
	Total				30

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Module	Topic	No. of Hours/Credits
Module I	Foundation of Wealth Management	
	<p>Chapter 1: Introduction to Wealth Management - Definition and Scope of Wealth Management - Evolution and Significance in Financial Planning</p> <p>Chapter 2: Financial Planning and Goal Setting - Understanding the Wealth Management Process - Setting and Prioritizing Financial Goals</p> <p>Chapter 3: Investment Strategies - Asset Allocation and Diversification - Investment Vehicles (Stocks, Bonds, Real Estate) - Investment Vehicles for HNIs (AIF, Hedge Funds, Private Equity)</p>	15
Module II	Components of Financial Planning	
	<p>Chapter 4: Insurance Planning - Meaning and Principles of Insurance - Types of Life Insurance Products - Calculation of required Sum Assured (Human Life Value and Need based approach) - Types of General Insurance Products</p> <p>Chapter 5: Retirement Planning - Introduction to Retirement Planning (Needs and Purpose) - 3 Step Retirement Planning Process and Calculations</p> <p>Chapter 6: Tax Planning - Tax Planning Concepts - Income Tax Savings Schemes</p>	15

Suggested Readings References:

1. Harold Evensky, Wealth Management, McGraw Hill Publication
2. NCFM, NISM, CFP, IIBF – Financial Planning & Wealth Management Modules

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Evaluation Pattern:

The performance of the learner will be evaluated for 50 marks in two components. The first component will be a Continuous Assessment with a weightage of 40% of total marks per course. The second component will be a Semester end Examination with a weightage of 60% of the total marks per course. The allocation of marks for the Continuous Assessment and Semester end Examinations is as shown below:

a). Details of Continuous Assessment (CA)

40% of the total marks per course:

Total Marks	External Component	Internal Component [ICA]	ICA Component	
			Internal test	Assignment
50	30	20	10	10

- 1] For 50 Marks-ICA Test Component-2 test of 10 marks, Average of the 2.
2] Duration: 30 marks -1 hour, 10 marks-20 Minutes
3] ICA Test-Offline

b. End semester exam (60% of total marks)

SEMESTER END ASSESSMENT: 30 MARKS		DURATION: 1 HOUR
<i><u>Question Paper Pattern (Semester –end Examination)</u></i>		
<i>All questions are compulsory</i>		
Q. No.	Particulars	Marks
Q.1.	A) Answer in brief OR B) Answer in brief	8
Q.2.	A) Answer in brief OR B) Answer in brief	8
Q.3.	A) Answer in brief OR B) Answer in brief	8
Q.4.	Read the following Case Study and answer the questions that follow.	6