

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

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<b>Module</b>	<b>Topic</b>	<b>No. of Hours/Credits</b>
Module I	<b>Foundation of Wealth Management</b>	
	<p><b>Chapter 1: Introduction to Wealth Management</b>            - Definition and Scope of Wealth Management            - Evolution and Significance in Financial Planning</p> <p><b>Chapter 2: Financial Planning and Goal Setting</b>            - Understanding the Wealth Management Process            - Setting and Prioritizing Financial Goals</p> <p><b>Chapter 3: Investment Strategies</b>            - Asset Allocation and Diversification            - Investment Vehicles (Stocks, Bonds, Real Estate)            - Investment Vehicles for HNIs (AIF, Hedge Funds, Private Equity)</p>	15
Module II	<b>Components of Financial Planning</b>	
	<p><b>Chapter 4: Insurance Planning</b>            - 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><b>Chapter 5: Retirement Planning</b>            - Introduction to Retirement Planning (Needs and Purpose)            - 3 Step Retirement Planning Process and Calculations</p> <p><b>Chapter 6: Tax Planning</b>            - 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**

Details of Continuous Assessment (ICA): 40% of the total marks per course:

<b>Continuous Assessment</b>	<b>Details</b>	<b>Marks</b>
Component 1 (ICA – 1)	Internal class test (online or offline) MCQs/ Explain the concepts/ Answer in brief / Case study or application -based questions	10 marks
Component 2 (ICA – 2)	Presentations/ Project work/ Viva-Voce/ Book Review/ Field visit & its presentations/ Documentary filming/ Assignments/ Group Discussions Etc.	10 marks

**SEMESTER END ASSESSMENT: 30 MARKS**

**DURATION: 1 HOUR**

**Question Paper Pattern for Theory Subjects (Semester –end  
Examination)**

All questions are  
compulsory

<b>Q. No.</b>	<b>Particulars</b>	<b>Marks</b>
Q.1.	A. Answer in brief OR B) Answer in brief	8

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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