FPSB INDIA
FINANCIAL PLANNING STANDARDS BOARD INDIA

"Financial Plan Construction"

on

March 2, 2017 in Kochi

FPSB India is pleased to announce the workshop on **"Financial Plan Construction"** by **Mr. U N Subhash** to be held on **March 2, 2017**. "Financial Plan Construction" is for the professionals who have gained theoretical knowledge and want to improve practical knowledge & expertise to design and develop the Financial Plan for their clients. This intensive workshop shall provide you deep insights of Financial Planning areas and shall take you to the practical learning via real life case study in developing the plan and discover ways in which you can establish yourself as a proficient Financial Planner/Advisor.

Who Should Attend?

- ✔ **Entrepreneurs** : Entrepreneurs running the Financial Advisory/Financial planning business.
- ✔ **Corporate** : Corporate working in Wealth Management/Portfolio Management/Financial Planning Division/Real Estate/Insurance & MF Advisors.
- ✔ **Professionals** : Candidates pursuing CFP Program, CFP^{CM} Practitioners, CFAs, CA , CS, ICWA, MBA- Finance, IFAs, Financial Planner aspirant etc
- ✔ **Students** : Pursuing career in financial services.

Content of the Workshop:

Sr. No	Topics
1	Data gathering and relationship building
2	**Analyzing existing Assets** a. Equity Portfolio review b. Mutual Funds Portfolio review c. Debt Portfolio review (FD's, Post office Deposits, Bonds, etc) d. Ratio of Personal Assets to Investment Assets e. Real Estate and Bullion review f. Existing Asset allocation
3	**Analyzing existing Insurance** a. Life Insurance policies of the family b. General Insurance policies of the family (health, motor, personal accident, etc.)
4	**Analyzing Income** a. Regularity and Consistency of Income b. Income Growth Rate
5	**Analyzing Expenses** a. Household Expenses b. Lifestyle Expenses c. Pure Insurance premiums calculation, Taxation etc. d. EMI's
6	**Analyzing Liabilities** a. Interest rate b. Pre-payment charges c. Outstanding balances
7	**Goal Calculation**
8	**Mapping of assets with Goals**
9	**Analyzing achievement of goals**
10	**Advising products for meeting the shortfall** a. Goal Shortfall b. Shifting to proposed asset allocation c. Life insurance requirements d. General insurance requirement

Date : March 2, 2017
Venue : HOTEL AVENUE REGENT, Mahatma Gandhi Road, Jos Junction, Ernakulam, Kerala 682016

Speaker's Profile

Mr. U. N. Subhash is a CFP Certificant with an experience across Mutual funds, Taxation, Insurance, Stocks & Commodities since 2002. He is in own practice since 2008. He has personally trained more than 80 people so far pursuining CFP certification. He has also given training to large number of people across the 4 southern states on personal finance related topics at Corporate, Banks, AMCs, and for Insurance Agents and Mutual fund Agents. He also conducts Retirement planning workshops for SBI, Sundaram fasteners & Coromandel group. His articles are regularly published in Tamil financial magazine 'Nanaya Vigadan'

Program Schedule:

09.30 am to 10.00 am	Registration
10.00 am to 01.00 pm	Session I
01.00 pm to 02.00 pm	Networking Lunch
02.00 pm to 03.15 pm	Session II
03.15 pm to 03.30 pm	Hi Tea
03.30 pm to 05.30 pm	Session II continued
05.30 pm	End of Session

Note : The participants are required to carry a Laptop or Financial Calculator (FC200V) and a Pen Drive for the training.
5 CE points shall be granted to CFP Certificants attending this workshop.