MS-Excel Based Financial Plan Construction

Saturday, August 25, 2018, Chennai

FPSB India is pleased to announce the workshop on “Financial Plan Construction” by Mr. N. R. Ramakrishnan to be held in Chennai on August 25, 2018. The workshop is for those professionals who have gained theoretical knowledge and would now like 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 studies in developing the Financial Plan and discover ways in which you can establish yourself as a proficient Financial Planner / Advisor.

WHO SHOULD ATTEND?

- Entrepreneurs: The workshop is suitable for entrepreneurs who are running the Financial Advisory/Financial Planning business or wish to run a firm
- Corporate: Corporate working in Wealth Management/Portfolio Management/Financial Planning Division/Real Estate/Insurance & MF Advisors.
- Professionals: Candidates pursuing CFP® Program, CFP® Practitioners, CFAs, CA, CS, ICWA, MBA- Finance, IFAs, Financial Planner aspirant etc
- Students: aspiring to make a career in financial services.

CONTENT

1. The concept of Financial Plan Construction.
2. Areas to be considered for drafting Financial Plan or Portfolio construction.
3. Simulation with Real Life case study.
5. Contents covered – Insurance-Need calculation, Loan Schedules, Investments approach, Asset Allocation, Retirement corpus calculation, Taxation etc.
7. Preparation of alternatives and presentation of the Plan.

DATE

25th August 2018
(Saturday)

VENUE

Vestin Park
(A unit of Vestin Park Hoels),
39, Red Cross (Montieth) Road,
Egmore,
Chennai - 600 008.

SPEAKER’S PROFILE: Mr. N. R. Ramakrishnan

- CFP®, LLB, CAIIB, B.Sc (H) with over 36 years’ experience in Banking, Mutual Funds & Financial Planning possessing managerial, technical & training skills with proven track record. He is NISM Certificate holder of series VA, XA, XB. He held senior positions in the areas of credit, retail banking, Marketing mutual funds, HR and knowledge Management.
- He is currently associated as a Trainer on retainership with SBI Mutual Funds since December 2015.

PROGRAM SCHEDULE

09.30 am to 10.00 am
Registration
10.00 am to 1.00 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
Tea
03.30 pm to 05.30 pm
Session II continued
05.30 pm
Close of Session

REGISTRATION PROCEDURE: (GROUP DISCOUNTS AVAILABLE)

Participation Fee: INR. 3,500 + GST i.e. INR 4,130 per participant.

Special Discounted: Fee for Employees of Charter Member Organizations: INR 3,000 + GST i.e. INR 3,540 per participant.
- Fee includes Morning Tea-Breakfast, Lunch, Evening Tea and Stationery
- Mention the name of Participant, Mobile no. & Email id. behind the Cheque/DD
- Demand Draft / Cheque favoring ‘FPSB India’ payable at Mumbai to be sent at the below mentioned address:
  “FPSB India, 916, 9th Floor, Indra Prakash Building, 21,Barakhamba Road, Connaught Place, New Delhi-110001”
- Fee can also be paid online through NEFT.

For registrations please get in touch with: Mohit: (mohit@fpsbindia.org), 9899237879
Payal: (payal@fpsbindia.org), 9833293298
Shilpi: (shilpi@fpsbindia.org), 9619230072
Sajju: (sajju@fpsbindia.org), 9820582723
Ravi: (ravi@fpsbindia.org), 9619331160

Note: 5 CE points shall be granted to CFP® certificants attending this workshop.

The participants are required to carry a laptop and a pen drive for the training.

(Participants are requested to let us know in advance if they have requirement of Jain Food.)