

WEALTH ESSENTIALS COURSE

Detailed Course Curriculum

Part 1-

1. Different Investment Avenue

- a. Core asset classes
- b. Different Investment Avenues
- c. Understanding Mutual funds and their types
- d. Using Mutual funds for wealth creation

2. Core principle of investing

- a. Why investing for Long Term matters?
- b. Portfolio diversification
- c. Systematic Investment Planning
- d. Keeping investment costs low
- e. Reversion to the mean & market cycles
- f. Common Investing Mistakes

3. Investment process

- a. Goal Planning & Risk Profiling
- b. Asset Allocation
- c. Building your portfolio
- d. Different approaches & strategies
- e. Review & Rebalancing your portfolio

Part 2

1. Risk Management

- a. Life Insurance Planning
- b. Health Financing
- c. Asset Protection

2. Retirement Planning

- a. Planning for financial security
- b. Building your nest egg
- c. Creating income for life

3. Other Wealth Issues

- a. Personal Tax Strategies
- b. Estate & Legacy Planning
- c. Effective Liability Management

Managing major Purchases