

# **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
- d. Managing major Purchases