

# PERSONAL FINANCIAL PLANNING SOLVED NOTES EBOOK CHAPTERWISE



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## **Short Description**

**PERSONAL FINANCIAL PLANNING SOLVED NOTES EBOOK  
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**Product Details: PERSONAL FINANCIAL PLANNING SOLVED NOTES  
EBOOK CHAPTERWISE**

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**Pub. Date: NEW EDITION APPLICABLE FOR Current EXAM**

**Edition Description: 2018-19**

**Pages : 220+**

## **RATING OF EBOOK: EXCELLENT DOWNLOAD IN FEW HOURS**

### **1. DOWNLOAD EBOOK WITH NOTES CHAPTER WISE**

## **PREVIEW OF CHAPTERS SYLLABUS**

### **PERSONAL FINANCIAL PLANNING**

#### **Description**

- 1. Basics of Personal Financial Planning: Definition, Importance and process of financial planning, Concept of time value of money in single and series.**
- 2. Managing Investment Risk: types of risks, measurement and management of risks and financial statements.**
- 3. Measuring Investment Returns: Risk and Return trade-off, Short term and long term capital Gains. Choosing the various source of credit and credit alternatives.**
- 4. Investment Vehicles: Investment concerns, Small saving schemes, Fixed income Instruments, Mutual funds and other investment schemes and Asset classes.**
- 5. Investment Strategies: Various Strategies and asset allocation. Evaluating investment in various stocks and Various Loans and their usage.**
- 6. Investment Strategies: Investing in stocks, bonds and commodities and concept of Futures and options. Insurance Planning;-Personal risk management, Nature and function of Insurance, Need analysis and Various Insurance products. Concept of Health Insurance.**
- 7. Retirement Planning: Process, Annuities and its types, Asset allocation & diversification and concept of mortgage and its types.**
- 8. Tax and Estate Planning: Various heads of incomes, Exemptions in Income tax applicable to various categories. Concept of wealth Tax. Estate Planning need and creation of Will and various formats.**
- 9. Strategies of putting together a Complete Financial Plan: Benefits, Essential components of comprehensive financial plan. Implementing Personal Financial Plan.**
- 10. Regulatory Environment: Government regulations and various regulators like SEBI, IRDA, and ethical issues involved in Financial Planning.**

#### **Details**

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- 3. Ready to print**
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