

Certification workshop on Private Banking and Personal Finance

For the Banking and Insurance Management students, IMERT conducted certification Workshop on Private Banking and Personal Finance on 12th, 18th, 19th, 26th August 2017 (20 hrs).

Workshop conducted by ICICIdirect Centre for Financial Learning and resource person was Mr. Heramb Vadalkar, a renowned Certified Financial Planner and Chartered Financial Analyst having experience in the field of Financial Planning, Product Development, Investment Recommendations, Equity Analysis, Writing articles and Training & Development.



The focus of this workshop was to make student familiar with the concept of Financial Planning, Private Banking, Portfolio foundations, Traditional Assets, Retirement and Insurance Planning and Creating and managing Relationships. This work shop helped IMERT students to successfully get recruitment with AXIS bank and Kotak securities Ltd.

The syllabus for Workshop on Private Banking and Personal Finance Module wise was as follows:- Module 0 : Introduction to Financial Planning, Module 1 : Introduction to Private Banking , Module 2: Portfolio foundations , Module 3: Traditional Assets, Module 4 : Retirement and Insurance Planning, Module 5 : Creating and managing Relationships.