



ST ALOYSIUS

(DEEMED TO BE UNIVERSITY)

Mangaluru 575003 - India

School of Arts and Humanities

DEPARTMENT OF POST GRADUATE STUDIES & RESEARCH IN ECONOMICS (PG & UG)

Offers Certificate Course

PERSONAL WEALTH MANAGEMENT

Features

- Offline Mode
- Practical Classes
- Learn from Industry Expert

Course Highlights & topics we will cover

- Solving practical & Real life situations using MS Excel
- Understanding and Managing CASH FLOWS
- Wealth Management Cycle -
Wealth Creation / Preservation / Transfer
- Concepts of Financial Freedom /
Financial Retirement



This course provides practical framework to manage one's personal finances effectively.



The content of the course will enhance one's employability in the financial services industry.



It provides insights on key topics of personal finance.



Leverage this course and its insights to create and manage portfolios using principles that can be scaled from personal to professional.

COURSE INFORMATION

Eligibility: OPEN TO ALL

Commencement Date:

4th week of January 2025

Duration:

2 days per week (15 hours)

Time :

4:30 p.m. to 6.30 p.m.



Resource Person

Mr RUBEN MENEZES QFPF®

A Qualified Personal Finance Professional and a Certified Wealth Manager. He has a rich experience of over 24 years in the field of investments and a guest faculty at St. Aloysius Business institute for the past 15 years. He brings a practical approach to learning making it interesting and relevant.

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90360 82817, 87223 07260

Register Now





St Aloysius (Deemed to be University)

Mangaluru-3

Re-accredited by NAAC “A+” Grade

**Course structure and syllabus of
Certificate Course in Personal
Wealth Management**

Value Added Programmes

Structure

Course	Duration of the Hour	Modules
Certificate	30	2

Course Name: Personal Wealth Management

Course Duration: 30

Course Type: CC

Mode: Offline

Resource Personal: External

Course Coordinator:

Dr Manohar Vincent Serrao

Associate Professor of Economics,

School of Arts and Humanities,

St Aloysius (Deemed to be University)

manohar_serrao@staloysius.edu.in

Course Instructor: External

Mr Ruben Menezes



Qualified
Personal
Finance
Professional®

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Certificate Course in Personal Wealth Management (30 Hours): Course Overview

This course is designed to provide students with a comprehensive understanding of personal wealth management, including financial planning, investment strategies, risk management, retirement planning, and tax considerations. The program aims to equip students with the knowledge and skills necessary to manage their personal finances effectively and make informed financial decisions.

Course Outcomes:

- ❖ Students will be able to create and manage personal budgets, Budgeting skills Investment Knowledge, Retirement Planning, Risk Management.
- ❖ Students will be able to plan and understand Human Life Value, Insurance Return Calculations

Module 1: (15 Hours)

Understanding and Managing CASH FLOWS - Time Value of Money concepts with illustrations-Wealth Management Cycle - Wealth Creation / Preservation / Transfer-Concepts of Financial Freedom / Financial Retirement Loans, EMI's and Amortization Tables.

Module 2: -(15 Hours)

Basics of Behavioural Finance-Human Life Value – Concepts of Insurance-Risk and Return Calculations

Mode of Evaluation: Test – 02 & Assignment – 02 (Each Module)
