

**Rukmini Devi Institute of Advanced Studies**  
Madhuban Chowk, Rohini, Delhi-110085  
(Approved By AICTE & Affiliated With GGSIP University)

# **DOSSIER**

*On*

**Guest Lecture**

*On*

**“Financial planning and Wealth Management**

*At*

**RDIAS**

*on*

**February 28, 2018**



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## **FORM A**

### **Proposal:**

- **Name of the event** : Guest lecture on “Financial Planning and Wealth Management”
  
  - **Date:** February 28, 2018
  
  - **Time:** 12:00 p.m. – 1:30 p.m.
  
  - **Venue:** Class Room
  
  - **Motivation for the activity:** Class room lecture is an opportunity for the students to interact and learn from renowned professionals and experts.
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- **Resource Person** - Mr. Sachin Kukreja and Ms. Shikha Kukreja, Directors,  
FININVEST, Janakpuri, Delhi

## **FORM B**

### **Part 1**

#### **Aim of the event:**

Wealth planning is the art of structuring your wealth while building it, preserving it, and in order to transfer it to the next generation tax-optimized. Wealth planning is a mix of tax planning, wealth protection, estate planning and business succession planning and relates to your total worldwide wealth. The lecture was organized to have an interactive session with the students to discuss all the basics regarding financial planning and wealth management.

### **Part 2**

#### **Abstract:**

Financial Planning is a must in everyone's life. Financial planning is an ongoing process that helps you make sensible decisions about money that can help you achieve your goals in life. It facilitates cash management and also supports wealth creation for long life. Sir initiated lecture with basic financial concepts and introduced students with terms like investment, saving, compound interest, simple interest, equity, debt etc.

Sir explained the students how financial planning facilitates cash management, prepares for financial contingencies and supports wealth creation for long life. There are number of financial products available in the market as per needs and risk aversion of the investors. Ms. Shikha Kukreja introduced and explained the students about various financial products like equity products, debts products and mutual funds etc. Ma'am explained how even a small investor and a common person by following financial discipline, can also invest in financial instruments and take the advantage of regular income & capital appreciation through route of mutual fund. Further, Madam discussed about various tax saving financial products like PPFs,

ELSS etc. she advised the students to start saving early so that they can also feel the power of good financial planning.

### **Part-3**

#### **Conclusion:**

The session was very interesting and informative where by the students raise their queries which were satisfactorily answered by the speakers. The session was really wonderful and students acquired lot of knowledge regarding personal finance and judicious wealth management techniques.