



RUKMINI DEVI

Institute of Advanced Studies

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Web Report on Guest Lecture on “Financial Planning and Wealth Management”

Title	Guest Lecture on “Financial Planning and Wealth Management”
Date	February 28, 2018
Resource Person/Facilitator	Mr. Sachin Kukreja and Ms. Shikha Kukreja, Directors, FININVEST, Janakpuri, Delhi
Summary	<p>Financial Planning is critical in everyone’s life for proper planning of finances. Financial planning is an ongoing process that helps you make sensible decisions about money and achieving professional and personal goals effectively. It facilitates cash management and also supports wealth creation for long life. The lecture began with the introduction of basic financial concepts and important terms like investment, saving, compound interest, simple interest, equity, debt etc. Mr. Sachin Kukreja 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 explained about the various financial products like equity products, debts products and mutual funds etc. Mam explained how even a small investor and a common man can follow financial discipline and invest in financial instruments to take advantage of regular income & capital appreciation through route of mutual funds. Further, Mam discussed about various tax saving financial products like PPFs, ELSS etc. She also advised the students to start saving early so that they can also feel the power of good financial planning. The session was very interesting and informative and all queries of students</p>

	were satisfactorily answered by the speakers. The session was really wonderful and students acquired lot of knowledge regarding personal finance.
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