

ELECTIVE COURSE – VI : WEALTH MANAGEMENT

About the course

The increase in personal wealth in the economy and lack of expertise and time on the part of individual investors has given rise to a need for personalized wealth management services. This course would help student harness their finance and marketing skill and cater to the needs of individual investors.

Objectives of the Course

- To create Successful Wealth Managers
- To harness the Finance and Marketing Skills of the Students

UNIT I

Marketing of Financial Services: Introduction – Services classifications and services marketing mix: people – process – physical evidence – product – price – promotion – distribution.

UNIT II

Consumer behaviour and financial services – Evaluation of consumers dissatisfaction and service perception.

UNIT III

Financial Services quality – services strategies.

UNIT IV

Fundamental financial concepts – Risk return characteristic – Basics of Equity concept – Debt concept – Derivatives and options – Currency market basics – Commodities – Portfolio Management Mutual funds – Insurance – Structured products.

UNIT V

Financial planning : Steps – tax planning – retirement planning – investor profiling : Asset allocation – process – Asset allocation and private banker.

Wealth Management – Process – Role of wealth Manager. Cases on Wealth Management.

Recommended Text Books:

- i) Financial Services and System By K. Sasidharan and Alexmathews – Tata Mcgraw Hill Co. Chennai Email: mark_pani @ mcgraw hill. com.
- ii) Services Marketing By Govind APTE Oxford University press – Chennai E.mail: v.anand @ oup.com.
- iii) Financial Services by S. Mohan and R. Elangovan _ Deep and Deep publications pvt ltd, E.Mail – ddbooks @ yahoo.co.in
- iv) Financial Management by Rajiv Srinivasava and Anil Misra – Oxford University Press Chennai.
- v) Portfolio Management – by Samir K. Barua, JR Varma and V. Raghunathan – TATA McgrawHill.
- vi) Wealth Management by S.Timothy Kochis, 2007 Edition ISBN – 13: 978-0-8080-8949-0 by CCH a Wolters Kluwer Business 4025 w. Peterson AVE Chicago, IL 60646-6085 [http:// CCH group.com](http://CCHgroup.com).
- vii) Wealth Management , The New Business Model by Major Suresh Goel (Rtd) Global India Publications PVT, Ltd New Delhi 110 002. E.mail:info @ global India publications.com.