



FinX[®]

B. K. Birla College, Kalyan (Empowered Autonomous Status)

in association with

FinX

**1 year PG DIPLOMA IN
WEALTH MANAGEMENT**

(Academic Year 2024-25)



Why Wealth Management?

Indian economy continues to grow, resulting into higher disposable incomes and soaring aspirations. This calls for the need for effective wealth management, opening many windows of opportunity for the **professionals seeking to build a career in financial services**. In recent years, the wealth management industry in India has seen an increase in the number of services offered, new players entering the market, and investments in cutting-edge technology.

The wealth management industry in India is evolving and changing quickly



- ✓ **Driven by technological advancements**
- ✓ **The increasing sophistication of investors, and**
- ✓ **The availability of new financial products**

About 80% of households by 2030 are predicted to be middle-income, up from about 50% in 2019. This trend indicates a significant shift in the financial landscape of the country. As more people enter the middle class, their financial goals and aspirations also change. They seek professional advice on managing their wealth and planning for the future making wealth management a promising global career option.

This also makes wealth management one of the most exciting streams in the BFSI space.

Our **PG DIPLOMA IN WEALTH MANAGEMENT** helps build students strong **technical and behavioural skills** to cope up with the changing needs of the clients and economic environment.



Program Highlights

Industry Recognised Certifications | Internship & Placement support

We offer a full-fledged module-based teaching process that covers everything you need to understand wealth management. Students will be **trained in core wealth management as well as specialised finance roles** that require expert financial advice

- ✔ Joint PG certification from **B. K. Birla College, Kalyan (Empowered Autonomous Status)** and **FinX**
- ✔ Certification in **NISM-Series-V-A: Mutual Fund Distributors** & **NISM-Series-XXI-A: Portfolio Management Services (PMS)**
- ✔ **100% placement assistance** with annual package **5 Lacs and upwards**
- ✔ **Training by leading industry Practitioners**
- ✔ **Industry-Relevant Curriculum: The curriculum of a PG Diploma in Wealth Management aligns with industry standards and practices.**



Program Benefits



Prepares you to be job ready in the BFSI industry and gears you up to start a career in Wealth Management



Allows you to practically implement the concepts through case studies and while pursuing internships in the corporate world



Enhances your behavioral skills to build long lasting client & business relationships in the industry



Recognition in the industry by becoming an **Accredited Wealth Planner**



Comprehensive understanding of wealth management equips you to serve high net worth individuals (HNIs) efficiently.



Enhances your employability and opens up various career opportunities in wealth management firms, private banks, asset management companies, family offices, and financial advisory firms.



Apart from benefiting your professional career, the program also equips you with essential skills for managing your personal finances.



Course Structure & Fees

Semester 1

- Security Analysis & Valuation of Assets
- Economic Environment of Business
- Financial Management
- Financial Markets and Products
- Personal Income Tax & Tax Planning
- Introduction to Banking and Insurance

Semester 2

- Portfolio Management
- Derivative Instruments
- Wealth Management Basics with CIEL WM Certification
- Legal Aspects of Wealth Management
- Emerging Trends in Wealth Management
- Professional Ethics and Code of Conduct for Wealth Managers
- Entrepreneurship Development

FEES

₹75,000

Inclusive of GST

1 year program with 3 months internship



Industry Expert Trainers



Nikunj Sharma

Director, CIEL & Head Investor Awareness & Training

Nikunj has over 25 years of experience in the BFSI industry and a published author of the book 'The Stock Market Monk'



Harish Menon



CA & Founder & CEO of H-Zone Capital Management Services (H-Zone Capital) & Co-Founder of House of Alpha

Harish has over 20 years of experience in financial markets, taxation, accountancy.

FinX Placement Partners

Work with the most reputed names in the Banking, Financial Services and Insurance industry





B.K Birla College

B. K. Birla College of Arts, Science and Commerce (Autonomous), Kalyan a multi-faculty premier institution of higher learning, with an enrolment of more than 12,800 students (8,400+ students in UG, PG and Research Programmes and 4400+ in Junior College) is affiliated to the University of Mumbai (UoM). The College was established in 1972, by Kalyan Citizens' Education Society with the blessings of Pujya Shri B. K. Birla ji and Pujya Smt. Sarala ji Birla.

The College offers 30 UG, 31 PG courses and 09 Ph. D. programs. The College also conducts PG Diploma in Bio-nanotechnology and A-DMLT. The UGC has sanctioned a Community College for Diploma in Accounting and Taxation in 2015-16.

The College has been reaccredited (3rd Cycle) by NAAC and awarded 'A' Grade(CGPA- 3.58) in 2014

The College in the pursuit of excellence has attained numerous awards and accolades. The College has been consistently ranked among the best colleges of India in different education surveys nationwide. Recently, the college has been Ranked No.1 as 'Promising Future Ready - Institution' by Education World, India Higher Education Rankings 2021-22.

The College ranked 4th in sports (30 Gold, 13 Silver and 12 Bronze) in UoM (2018-19). 28 students have represented the college at National Level and won One Gold, Five Silver and One Bronze medals. The management provides financial support to the students for participating at International and National Level. The College provides Tuition fee concession to needy students in addition to scholarships / freships by Government.

The College has been granted 'Autonomous Status' by UGC and UoM from 2018 - 19.

About FinX

We are a skilling company, driven by promise of a brighter India, vision of connecting formal education with practical skilling to create job ready students for BFSI. We are one of the largest corporate training companies in BFSI Industry and have been providing corporate learning solutions since 15 years to employees and professionals in Banking, Asset Management, Wealth Advisory, Insurance, Financial Distribution and Broking Companies.

We are headquartered in Mumbai (financial capital of India) with presence over 100 cities across the country**. Senior Management team comprises accomplished & seasoned professionals from BFSI Industry with cumulative experience of over 200 years.

We work with BFSI Corporates & Learners with an objective to-

- Train corporate employees on regulatory gate-keeping examinations, specialised certifications in finance & online courses
- Conduct customised induction programs and productivity enhancing techno - behavioural trainings
- Conduct Financial Awareness Programs on behalf of Regulators, Stock Exchanges and Mutual Funds for corporate employees, faculty, students, self-employed, women groups etc

Our Credentials

- **600000 +** Corporate employees and learners trained
- **50+** Placement Tie-ups with BFSI companies
- **100+** Corporate tie-ups for Training / Up-skilling mandates
- **100+** Online Courses and Certifications (BFSI Technical Domains and Soft Skills)
- **1000+** Empanelled Trainers across the country
- **NISM accredited** Training Partner for CPE since 2010
- Partner of **SEBI, PFRDA, NISM, NCFE, BSE, NSE** and many more
- **15000+** Students trained to be job ready
- **200+** College affiliations pan-India