N. L. Dalmia
College of Arts, Commerce & Science
(A School of Excellence of N. L. Dalmia Educational Society)

Wed 15 Aug 2024

NOTICE

Accounts, Finance & Commerce Club and the **BCom department** propose to conduct an **Add-on Course** on **Personal Financial Planning**. This Course will be open to all students of NLDC.

Course Objectives:

- To gain a fundamental understanding of financial concepts and money management to track income & expenses effectively.
- To acquire insights into investments, risk management and financial decision-making.

No. of Hours : 30 hrs

Mode of Lectures : Hybrid

Duration of Course : 20/8/2024 to 31/08/2024

Audience: NLDC students

Modules & Duration:

Module no.	Particulars	No. of hours
1	Personal Financial Planning Process	06
2	Personal Financial Statement Analysis	06
3	Financial Mathematics	06
4	Investors Psychology	06
5	Assessment	06
	Total hours	**30**

A certificate will be issued on the successful completion of the course.

15/08/2024
Coordinator
Ms Gunakshi Khandeka

Principal
Dr Ganesh Pawar
15/08/2024

N. L. Dalmia College of Arts, Com. & Sc.
Mira Road
401107

Mon 12 Aug 2024

Proposal For Add-on Course on Personal Financial Planning

Accounts, Finance & Commerce Club and the **BCom department** propose to conduct an **Add-on Course** on **Personal Financial Planning**. This Course will be open to all students of NLDC.

No. of Hours : 30 hrs
Mode of Lectures : Hybrid
Duration of Course : 20/8/2024 to 31/08/2024

This course is designed to impart students with financial literacy and better money management skills. With the purview of a highly changing economic environment, it is important to equip students with key concepts such as Financial Planning, Analysis of Financial Statements, Savings, Investments, Managing Debt and Investors Psychology.

Course Objectives:

- To gain a fundamental understanding of financial concepts and money management to track income & expenses effectively.
- To acquire insights into investments, risk management and financial decision-making.

Course Outcomes: By implementing this course, we anticipate the following outcomes:

- Improved capability of students to apply financial principles and plan for future financial needs.
- Enhanced skills in developing investment and saving strategies.

Modules & Duration:

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4	Investors Psychology	06
5	Assessment	06
	Total hours	**30**

A certificate will be issued on the successful completion of the course.

Proposed by: Accounts, Finance & Commerce Club and BCom department

Approved By

12/8/24

Teachers in-charge
Ms. Shifa Tuscano
Ms. Sangeeta Jain

12/08/2024

Coordinator
Ms.Gunakshi Khandeka

Principal
Dr.Ganesh Pawar
12/08/2024

N. L. Dalmia College of Arts, Commerce & Science

Activity Report

Name of Activity: Add- on Course
Topic : Personal Financial Planning
Conducted by : Accounts & Finance Club in Association of Department of Commerce
Date, Time, Venue: Saturday, 1st March 2025, 0830 AM to 0930 AM , Classroom 701

Name(s) of Teacher(s) Incharge:
Asst. Prof Shifa Tuscano
Asst. Prof Sangeeta Jain

No. of Participants : 54
Male: 26
Females:28
Other: NA

Description of Activity:
The Add-On Course in Personal Financial Planning is designed to help individuals understand the essentials of financial planning, including budgeting, investing, insurance, retirement planning, tax management, and estate planning. The course is structured to provide theoretical knowledge as well as practical applications, enabling participants to apply these concepts to their own financial situations.

The main objectives of the course are:

- To gain a fundamental understanding of financial concepts and money management to track income & expenses effectively.
- To acquire insights into investments, risk management and financial decision making.

Course Overview

The course covers the following key topics:

1. **Personal Financial Planning Process** : to collect client's information, to Analyse their financial status,Risk Profile & Determine Financial Goals.
2. **Personal Financial Statement Analysis**: Cash inflows and outflows -Cash Management, Income and expenditure statement, Budgeting & Forecasting.
3. **Financial Mathematics** : calculation of Nominal Rate of return, Effective Rate of Return, Time Value of Money, CAGR.
4. **Investor Psychology** : Value investing & Behavioural Finance, Role of emotions in finance decision - making, Basic investment style and its drawbacks.

Methodology

The course utilizes a blend of theoretical lectures, case studies, and hands-on exercises to ensure participants not only understand the concepts but can also apply them. Learning methods include:

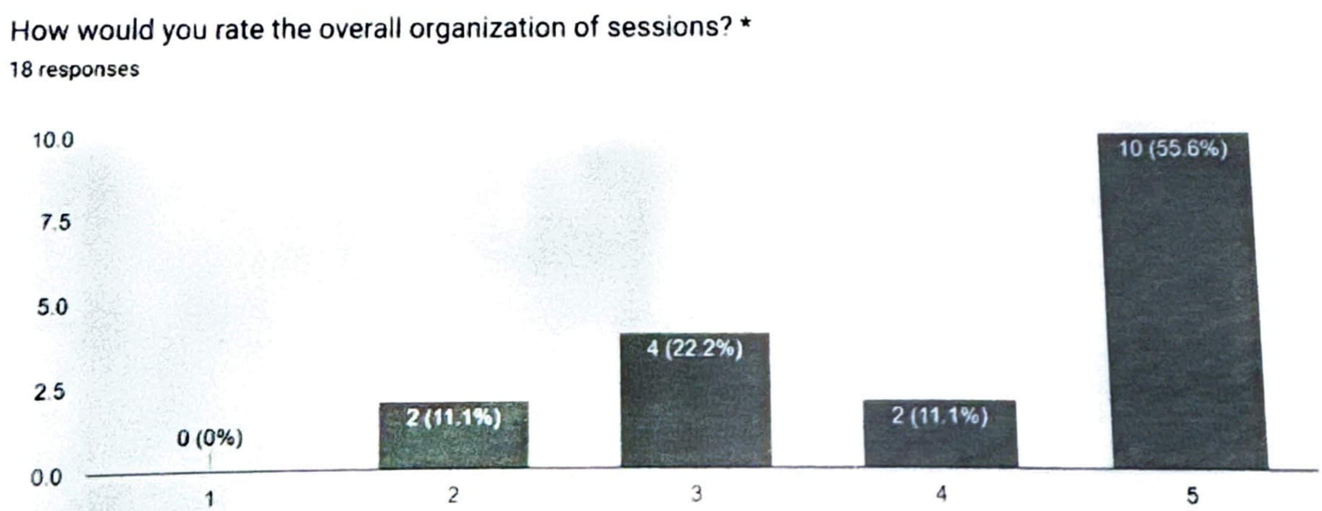
- **Lectures:** Delivering key theoretical concepts.
- **Workshops:** Interactive sessions where participants engage in practical financial planning.
- **Case Studies:** Real-life examples and scenarios for decision-making practice.
- **Assessments:** Test through google forms to assess knowledge and application.

Evaluation and Outcomes

Upon completing the course, participants should be able to:

- Develop their own financial plans.
- Analyze investment opportunities based on risk and return.
- Understand and use different financial tools for personal growth.
- Make informed decisions regarding insurance, taxes, and estate planning.
- Take proactive steps towards securing their financial future.

Feedback Analysis :



Signature of In-charge : ____________

Attachment: Geotag **Photo**


N. L. Dalmia
College of Arts, Commerce & Science
Department of BCom & Accounts, Finance & Commerce Club
Organizes
Add-On-Course
financial planning
FINANCE
TAX
GPS Map Camera
Mira Bhayandar, Maharashtra, India
N L Dalmia Institute Of Management Studies And Research, Sector 1, Bhaktivedanta Swami Marg, Siddhi Vinayak Nagar, Mahajan Wadi, Mira Road East, Mira Bhayandar, Maharashtra 401104, India
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Long 72.871099°
20/08/24 11:05 AM GMT +05:30
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Personal Financial planning
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Mumbai, Maharashtra, India
Shrishti Sector 1, Iskcon Temple, Siddhi Vinayak Nagar, Mahajan Wadi, Mira Road East, Mumbai, Mira Bhayandar, Maharashtra 401107, India
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