NIRMA UNIVERSITY
Institute of Management
Master of Business Administration (Full Time) Programme/
Integrated Bachelor of Business Administration-Master of Business Administration Programme/
Master of Business Administration (Family Business & Entrepreneurship) Programme

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Course Code	**MFT5SEEF27 MBM5SEEF27 MFB5SEEF28**
Course Title	**Wealth Management**

Course Learning Outcomes (CLO):

At the end of the course, students will be able to:

1. Explain the concepts of wealth planning and management.
2. List the products available for different aspects of wealth planning.
3. Discuss the process of wealth planning and management.

Syllabus	**Teaching Hours**
Unit I: Overview of Wealth Management • Wealth Management Concepts • Financial Planning for Individuals	02
Unit II: Advisory Services • Client Relationship Management • Investment Advisory Process • Asset Allocation	05
Unit III: Avenues of Investment • Financial Markets • Capital Markets • Alternative Investment	05
Unit IV: Other Aspects in Planning • Tax and Wealth Planning • International Wealth Planning • Ethics	03

Suggested Readings:

1. Maheshwari, Y.,*Investment Management*. New Delhi: PHI Learning Private Limited.
2. Rao, B.,*Wealth Management and Financial Planning: Concepts and Practices*, Patridge Publishing India.
3. Evensky, H., Horan, S.M., Robinson, T. R., Ibbotson R., *The New Wealth Management: The Financial Advisor's Guide to Managing and Investing Client Assets*. Wiley India Pvt. Ltd.