SHAHEED SUKHDEV COLLEGE OF BUSINESS STUDIES

FinX

Certificate in Wealth Management Course

'ACCREDITED WEALTH PLANNER'

AWP Accredited Wealth Planner

in association with

Shaheed Sukhdev College of Business Studies & FinX

WHY WEALTH MANAGEMENT?

A career in wealth management is more than a job— it is an opportunity to be part of the global financial revolution. With the market set to reach $391.80 billion by 2024 and grow at a strong 4.56% CAGR through 2029, the demand for skilled professionals is more urgent than ever. As the number of high net worth (HNWIs) and ultra-high net worth individuals (UHNWIs) swell around the globe, the need to seek expert guidance to navigate complex financial decisions, optimize investment performance , and secure their futures is also on the rise at a breakneck speed. For students aspiring to make a mark, wealth management provides a dynamic, rewarding path marked by strategic planning, continuous learning, and the chance to build deep, impactful relationships with clients. It's more than just managing assets—it's about shaping financial destinies, guiding aspirations and driving meaningful outcomes for movers and shakers across the globe.

Why a course in Wealth Management ?

- The first **“home-grown” Wealth Management certification** launched in India in 2007.
- Developed in association with the growing **wealth management industry experts** in India.
- Start your career in the **shortest time possible.**
- Along with managing client portfolios, you'll also learn how to **manage your own finances**
- **Direct path to prestigious jobs** in MNCs, banks, and wealth management companies.
- The wealth management industry is **recession-resistant and always in demand** so prepare yourself for long-term career success.
- Discover a career that offers **both financial stability and high earnings** by helping clients manage millions.
- Our curriculum prepares you to **build and grow a practice**, serving clients with diverse and complex financial needs.
- **“Accredited Wealth Planner”** certification on successful completion of the course.

PROGRAM BENEFITS

Industry Recognised Certification | Internship & Placement Support

Our comprehensive program features a modular-based teaching approach designed to equip you with a thorough understanding of wealth management. Students will receive extensive training in core wealth management principles as well as specialized financial roles that demand expert financial guidance. This curriculum ensures that you are well-prepared to excel in both general and advanced financial advisory positions.

Wealth managers who provide personalised attention, proactive communication, transparent reporting, and a deep understanding of their clients' financial aspirations will be better positioned to succeed - *The Economic Times*

Joint Certification: **Earn a prestigious joint certification of an '*Accredited Wealth Planner*' from Shaheed Sukhdev College of Business Studies and FinX.**

NISM Certification Training: **Receive comprehensive training for NISM-Series-V-A: Mutual Fund Distributors and NISM-Series-XXI-A: Portfolio Management Services (PMS) examinations.****

Placement Assistance: **Benefit from 100% placement assistance with leading BFSI corporates offering competitive annual packages.**

Expert Training: **Learn from leading industry practitioners with hands-on experience.**

Industry-Aligned Curriculum: **The curriculum is designed to meet current industry standards and practices.**

*** We only offer training for the mandatory examinations. Candidates must independently attend these exams to receive their certificates.*

COURSE STRUCTURE & FEES

Technical	Behavioural and Selling Skills for Wealth Manager
• Risk return and asset allocation • Personal finance and investment planning • Equity market structuring and working • Equity analysis and investing • Debt markets • Derivatives • Insurance concepts, life insurance, general insurance • Other investment products – retirement, small savings scheme • Business of banking, banking products and services • Leverage in wealth management • Process in wealth management • Regulatory aspects in wealth management • Training for mandatory NISM VA (MFD) & NISM XXI A (PMS) certification examinations	• Life is sales- we are the goods • Different strokes for different folks • The art of probing • Making powerful presentations • Unleashing your sales potential • Sell but don't sell products • Becoming proton positive • Creating win-win situation for everyone • What the mind can conceive, it can achieve • Close deals like a pro

Registration and Fees Information

- **Last date to register: 14th Jan' 2025**
- **Course Fee: ₹31,356 (inclusive of all taxes)**
- **Fees Deposit Deadline: Tuesday 14th Jan' 2025**
- **Classes Commence: 19th Jan' 2025**

Fees once paid will not be refunded

Who can apply?

Candidates Pursuing Graduation or a Graduate

Registration Link

CLICK HERE

INDUSTRY EXPERT MENTORS

Kumar Bijoy

Faculty- Finance at SSCBS-University of Delhi

His 34-year career spans financial consultancy and training for both government agencies and private firms, as well as academic instruction for graduate students.

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.

Secure placements with top-tier organizations in the Banking, Financial Services, and Insurance industries.

FinX Placement Partners

SHAHEED SUKHDEV COLLEGE OF BUSINESS STUDIES (CBS)

The high standards of excellence give CBS the phenomenal and undeniable edge we are recognized for. And these standards are endlessly pushed beyond the horizon. This lays down the foundation of our biggest asset: Unrest. At CBS, we are never content. The inverse correlation between our satisfaction and our progress is an acknowledged and appointed theory at CBS. This is the CBS difference.

What sets CBS apart from other colleges is our recognition that every student is different. At CBS, we strive to identify and maintain that ‘difference’. We constantly endeavour to create opportunities for skill development in different areas of interest, and to cater to the diverse needs of the students. The fact that CBS doesn’t believe in a one-size-fits-all policy is evident in its placement process, where companies from as many as fifteen sectors, including consulting, insurance, knowledge services, real estate, media, investment banking, PR, IT, shipping, and financial services recruited students.

The curriculum and the college atmosphere promote inquisition, innovation, leadership and team-spirit. Apart from possessing a clear understanding of the fundamentals of management as well as a considerable degree of corporate exposure, our students are resourceful, versatile and enthusiastic. It is this marked difference that has helped the college set new benchmarks with every placement season.

Shaheed Sukhdev College of Business Studies (CBS)
PSP Area IV, Dr. K.N. Katju Marg, Sector 16, Rohini, Delhi-110089
Contact no: 011-21700284
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ABOUT FINX

At **FinX**, we train over 10,000 students every year through our collaboration on vocational courses & certifications with 300+ Universities & Colleges pan India. We are also the corporate training partners with over 100+ companies in Banking & Financial services for over 17 years and have trained over 200,000 employees.

Our collaboration with educational institutions focuses on providing an industry-aligned curriculum, designed with inputs from BFSI experts to meet current and emerging sector needs. We prioritise hands-on training, offering students real-world experience through internships, live projects, and case studies. Our programs are recognized by leading BFSI Corporates, enhancing students' credibility and employability. Additionally, we offer robust career support services, including 100% job placement assistance, ensuring a smooth transition from education to employment.

Credentials

- **28,000+** Students and learners trained to be job-ready
- **300+** College affiliations pan-India
- **50+** Placement Tie-ups with BFSI companies
- **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

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Why a course in Wealth Management ?

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- Developed in association with the growing wealth management industry experts in India.
- Combines theoretical concepts with case studies, business scenarios and real examples and illustrations facilitate application-based learning.
- Supplemented by interactive live sessions by BFSI industry experts to bring in valuable, practical insight.
- Recognised by top banks, mutual funds, brokerage firms, financial distributors, and wealth management companies.
- A well-rounded curriculum covering concepts and their application across investment markets, products, financial planning, insurance, banking, taxation and regulatory aspects.
- **"Accredited Wealth Planner"** certification on successful completion of the course.