



Sandip University
School of Commerce & Management Studies

“Webinar on Career in Personal Financial Planning”

by

**MBA Bfs students under the
School of Commerce and Management Studies**

on 08.03.2025

Conducted by:

NISM

About the Webinar:

The report "Career in Personal Financial Planning" by Dr. Mohd Meraj Inamdar and Mr. Ramakrishnan T B explores the opportunities and skills required for a career in personal financial planning within the securities markets. It highlights the role of financial planners in guiding individuals through investment strategies, risk management, tax planning, and retirement planning.

Objectives of the Webinar:

1. Understanding Personal Financial Planning
2. Exploring Career Opportunities
3. Required Skills & Qualifications
4. Industry Trends & Regulatory Insights.

The Activities Carried under the Webinar:

1. Financial Goal Setting
2. Budgeting & Cash Flow Management
3. Investment Planning
4. Risk Management & Insurance Planning
5. Retirement Planning

Outcome of the “Webinar”:

Learning Outcomes:

- **Improved Financial Stability** – Better management of income, expenses, and savings for financial security.



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- **Achievement of Financial Goals** – Effective planning helps individuals reach short-term and long-term financial objectives.
- **Optimized Investment Returns** – Strategic asset allocation and diversification lead to better financial growth.
- **Risk Mitigation** – Proper insurance and risk management reduce financial uncertainties.
- **Tax Efficiency** – Smart tax planning minimizes liabilities and maximizes savings.
- **Secure Retirement** – Well-planned retirement strategies ensure financial independence in later years.
- **Debt Reduction** – Effective debt management helps in reducing financial burdens.
- **Wealth Preservation & Transfer** – Proper estate planning ensures smooth wealth transfer and legacy planning.
- **Regulatory Compliance & Ethical Financial Management** – Adherence to financial laws and ethical practices ensures trust and credibility.
- **Financial Awareness & Confidence** – Individuals become more informed and confident in managing their finances..

Conclusion: A career in **Personal Financial Planning** offers immense opportunities for professionals to guide individuals in managing their finances effectively. With increasing financial awareness, regulatory changes, and the growing complexity of investment options, the demand for skilled financial planners is on the rise.

To succeed in this field, professionals must possess strong analytical skills, industry knowledge, and ethical integrity. Certifications such as **CFP (Certified Financial Planner)** and **CFA (Chartered Financial Analyst)** enhance credibility and career prospects.

By helping clients achieve financial security, optimize investments, manage risks, and plan for the future, personal financial planners play a crucial role in wealth management. Continuous learning, staying updated with market trends, and maintaining high ethical standards are key to building a successful and rewarding career in this domain.