PIMSE
SHAPING BETTER MANAGERS FOR FUTURE
Y. & M. Anjuman Khairul Islam's
POONA INSTITUTE OF MANAGEMENT SCIENCES & ENTREPRENEURSHIP
(A Religious & Linguistic Minority Institution, Recognized by DTE, Govt. of Maharashtra, Affiliated to Savitribai Phule Pune University,)
Approved by AICTE, New Delhi ISO 9001-2015 Certification
Office : K. B. Hidyatullah Road, Camp, Pune - 411 001. Tel. : 020 26448781 Website : www.akipimse.ac.in Email : director.pimse@gmail.com

COURSE (SEM - II)
206FIN: Personal Financial Planning
(2019 PATTERN)

SHORT QUESTIONS

1. What is the meaning of Personal Financial Planning?
2. Explain the steps of Personal Financial Planning.
3. What is the need for Personal Financial Planning?
4. Elaborate the challenges of Personal Financial Planning.
5. What are the code of conduct to be followed by financial planners
6. Elaborate on some initiatives taken for financial literacy
7. What is the importance of a financial plan
8. What is wealth management?
9. What is interest rate, types of interest rate and what is the effect of the same on financialplan
10. Mention the types of insurance
11. What do you mean by time value of money?
12. What are the functions and features of insurance
13. What are the types of investment risk
14. What is asset allocation and various steps in determining a unique asset allocation model
15. How to assess the residential status of an investor
16. What is long term and short term capital gain
17. What is a will and what are its features
18. What is power of attorney
19. What is the need for retirement planning
20. What are principles of wealth creation
21. What are the factors affecting wealth creation
22. What are the various tax saving instruments for Indians
23. What are the various pension schemes available in India
24.Difference between tax planning and tax evasion
25. Different types of Mutual Funds