

Bunts Sangha's

S.M. Shetty College of Science, Commerce and Management Studies, Powai.

**Student Enrichment Activity Approval Form**

**Department:** Department of Commerce and Allied Subjects

**Program:** One Day National Webinar on "Financial Planning and Investment Management"

**Objectives:** To guide and educate participants how to plan their finances and manage their investment during and post pandemic 2020.

**Need:** In present times, financial planning is topic that every individual who is earning or will earn must be aware of. Good financial planning starts at early age. Students must be aware of the different investment options available in the market so that they can plan efficiently from their initial earning days only.

**Content:** Ways to be free from financial stress, money management and Bad Money habits, wealth creation strategies, asset allocation, investment products like Equity, Bonds, Mutual Funds etc

**Resource Person:** Mr. Veerdhaval Talpade, Vice President - Training and Development, Parivartan Learning Solutions

**Date:** Friday, 5th June, 2020

**Timing:** 5:00 pm to 6:30pm

**Venue:** Zoom App and You Tube Live

**Cost/Budget:** N/A

**Proposed by:** Department of Commerce and Allied Subjects

VERIFIED BY:



Convenor of the webinar



Dr Sridhara Shetty

Principal



*Bunts Sangha's*  
*S.M. Shetty College of Science, Commerce and*  
*Management Studies, Powai. Mumbai - 76*



(Affiliated to University of Mumbai)

**NAAC ACCREDITED 'A' GRADE**  
**IMC RBNQ CERTIFICATE OF MERIT 2019**  
**ISO 9001:2015 CERTIFIED**



**Department of Commerce and Allied**  
**Subjects**



**National Level Webinar for Students**

on

***“Financial Planning and Investment Management”***

Resource Person:

**Mr. Veerdhaval Talpade**

(VP - Training and Development, Parivartan Learning Solutions)



*Date : 5th June, 2020      Time : 5:00 pm to 6:30 pm (Zoom Webinar)*

Registration Fees: **FREE**

**E-certificates Will Be Given**

**Registration Link:**

<https://forms.gle/HLCxyqBlPn7LwWxJA>

**For Queries Email us at:**

[prachia@smshettyinstitute.org](mailto:prachia@smshettyinstitute.org)



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Department of Commerce & Allied Subjects

Presents

National Level Webinar on

**'Financial Planning & Investment Management'**

*Date: 5<sup>th</sup> June, 2020*

*Time: 5 p.m. to 6.30 p.m.*

### Program Schedule

NATIONAL ANTHEM	
<b>Welcome Address and Introductory Remarks</b>	<b>Dr. Sridhara Shetty</b> <i>Principal HOD of Commerce Bunts Sangha's S.M. Shetty College of Science, Commerce &amp; Management Studies, Powai</i>
<b>Introduction of the Resource Person</b>	<b>Prof. Prachi Agarwal</b> <i>Convener of Webinar Bunts Sangha's S.M. Shetty College of Science, Commerce &amp; Management Studies, Powai</i>
<b>Technical Session</b>	<b>Mr. Veerdhaval Talpade</b> <i>Vice President – Training and Development Parivartan Learning Solutions</i>
<b>Vote of Thanks</b>	<b>Prof. Sahana Raviprasad</b> <i>Coordinator of BAF &amp; BBI Bunts Sangha's S.M. Shetty College of Science, Commerce &amp; Management Studies, Powai</i>

**Department of Commerce and Allied Subjects**  
**Report**  
**Webinar on “Financial Planning and Investment Management”**

**Event:** One Day National Webinar

**Topic:** “Financial Planning and Investment Management”

**Date:** Friday, 5th June, 2020

**Timing:** 5:00 pm to 6:30pm

**Venue:** Zoom App and You Tube Live

**Scope:** Students of Under Graduate and Post Graduate Courses (All Streams)

**Resource Person:** Mr. Veerdhaval Talpade, Vice President - Training and Development, Parivartan Learning Solutions

**Objective:** To guide and educate participants how to plan their finances and manage their investment during and post pandemic 2020.

**Highlights-** The webinar started with the Introduction of college followed by the welcome speech delivered by Principal Dr. Sridhara Shetty. After that Asst. Prof. Prachi Agarwal – Convener of the Webinar, introduced the resource person. Mr. Veerdhaval Talpade - the resource person educated and guided the participants about various useful topics like the need of financial planning, how to be free from financial stress, money management and Bad Money habits, wealth creation strategies, asset allocation, investment products like Equity, Bonds, Mutual Funds etc. His presentation was followed by a Question-Answers session where questions raised by participants related to the topic were answered by the resource persons. Session came to an end with a vote of thanks proposed by Prof. Sahana Raviprasad - BAF and BBI coordinator. Total 652 participants attended the webinar (on zoom app and you tube live). Participants belonged to different states of India like M.P., Rajasthan, U.P, Tamilnadu, Karnataka, West Bengal, Nagaland, Delhi, Punjab and many more. E-Certificates were distributed to all the participants who attended the session.

**Team Members for the event:**

**Asst. Prof. Sahana Raviprasad** - BAF and BBI coordinator

**Asst. Prof. Prachi Agarwal** - Convener of the Webinar

**Asst. Prof. Niveditha Shetty** - Member of Commerce Department

**Asst. Prof. John Menezes** - Member of Commerce Department

**Asst. Prof. Vijay Vishwakarma** - Member of Commerce Department

**Asst. Prof. Adv. Hamid Khan** - Member of Commerce Department

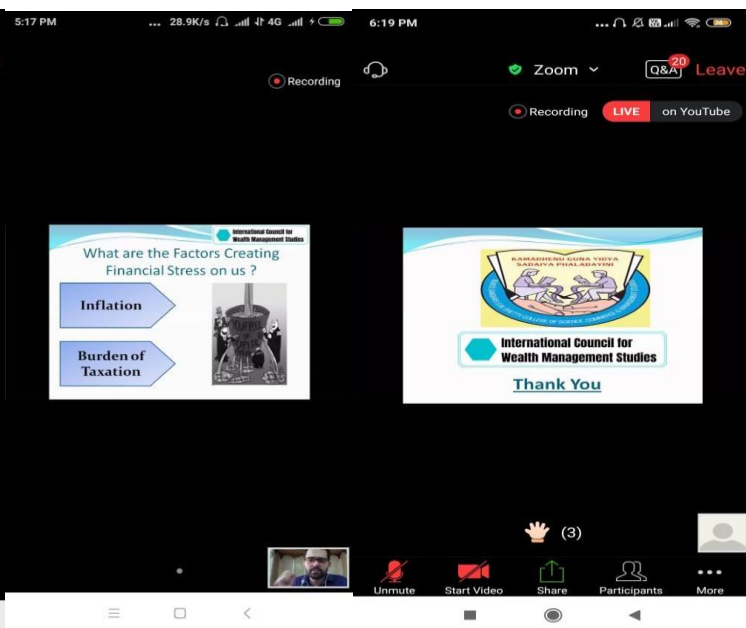
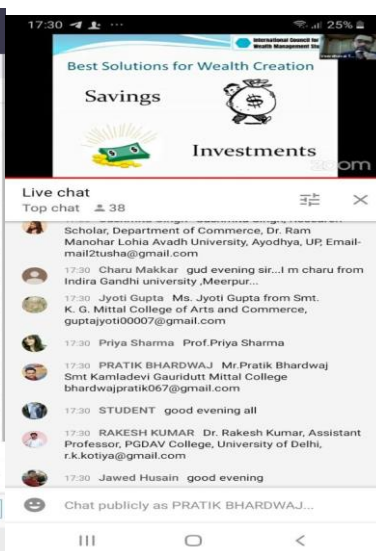
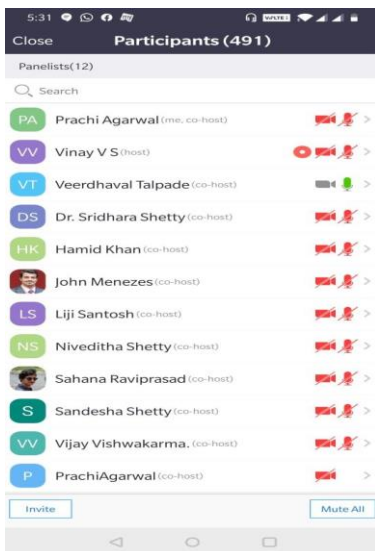
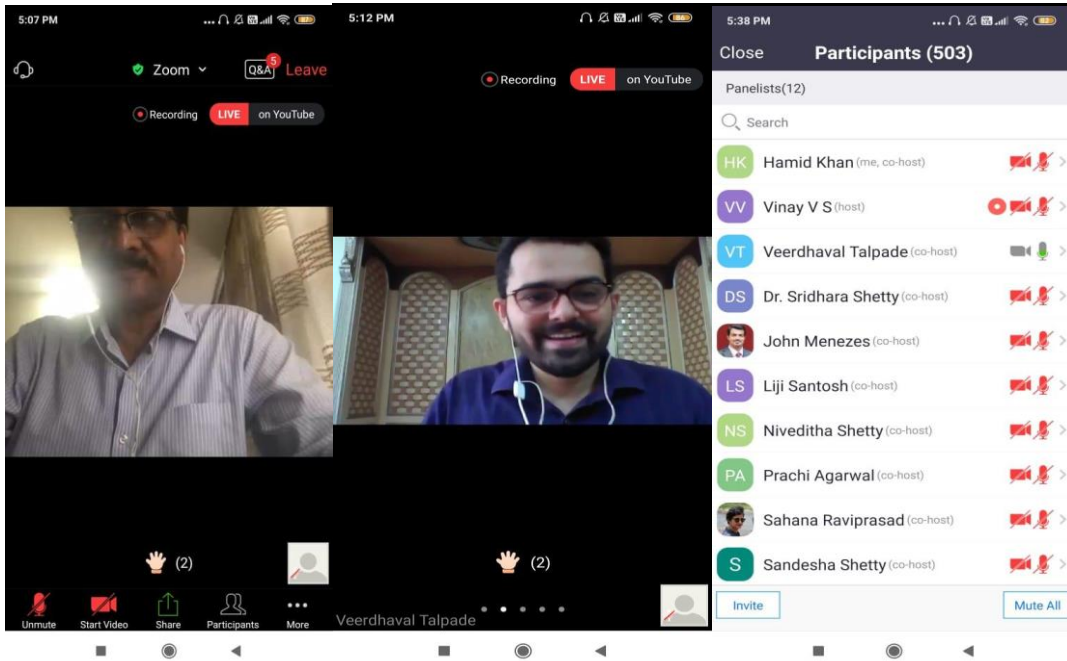
**Asst. Prof. Vinay Shahapurkar** – Technical support Head



Asst. Prof. Prachi Agarwal  
Convener of the Webinar



Asst. Prof. Sahana Raviprasad  
Coordinator



Recording LIVE on YouTube

You are viewing YourFriend Tapas's screen View Options

# How to Plan

Illustration:  
Rs.10000 invested every month for a period of 30 years, i.e. total investment amount Rs.36lacs

Percentage Growth	Maturity Amount	Possible Way
At 8%	Rs.1.5crs	Postal Recurring
At 12%	Rs. 3.5crs	SIP in Balanced Mutual funds
At 15%	Rs. 6.9crs	SIP in Equity Mutual funds

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Commerce Department 2019  
Vijay Sr Sma: Photo

Join Audio Start Video Participants Q&A Chat Share Screen Record Leave

5:44 PM

Zoom Q&A LIVE on YouTube

Recording LIVE on YouTube

## Asset Allocation

International Journal for Wealth Management Studies

Equity Fixed Deposits Real Estate Bonds

Asset Allocation

Most allocation - Most important determinant of returns in any portfolio

80-90% of the portfolio return can be attributed to asset allocation

Unmute Start Video Share Participants More Leave

## Feedback and ACTION TAKEN REPORT

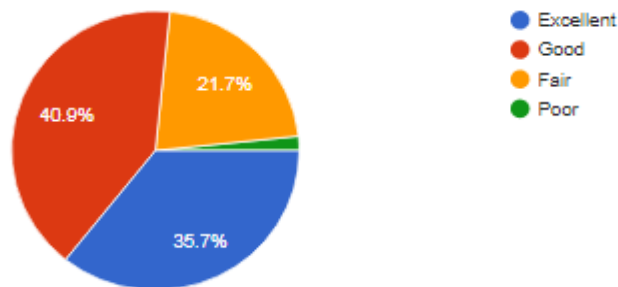
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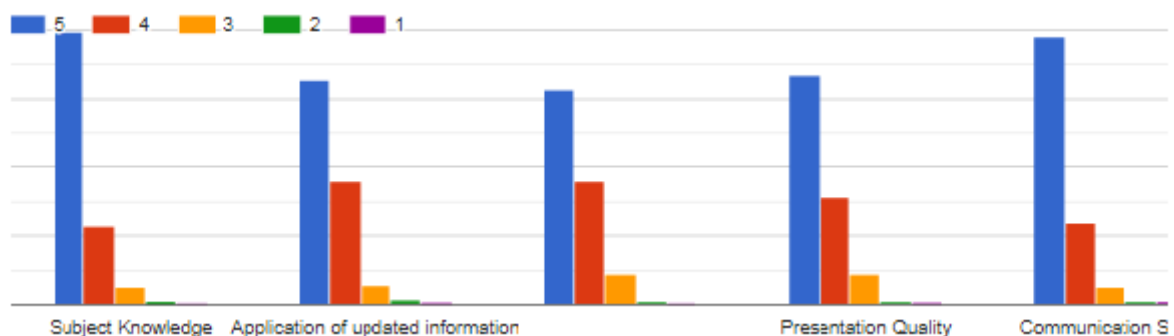
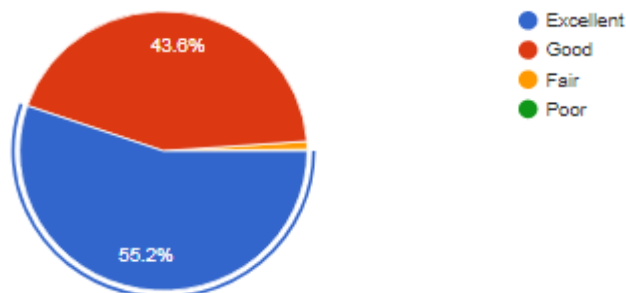
Please rate your overall knowledge level about the topics covered BEFORE ATTENDING the session.

543 responses



Please rate your overall knowledge level about the topics covered AFTER ATTENDING the session.

543 responses



Feedback received on all the parameters was highly positive and encouraging. Clearly participants felt that their knowledge has been significantly improved after attending the session. Suggestions were received regarding conducting more such events in the future for students. The Department of Commerce will strive to conduct such sessions in the next academic year as well.