

# **Finance and Banking**

## **Financial Planning & Wealth Management - Level 4**

### **Curriculum**

#### **Program Outline**

##### **Module 1: Financial Services Regulation and Ethics**

- Basics of regulatory standards and ethical principles in financial services.

##### **Module 2: Personal Taxation I**

- Introduction to personal taxation techniques.

##### **Module 3: Personal Taxation II**

- Advanced techniques for managing personal taxation.

##### **Module 4: Investment Principles and Risk I**

- Basics of investment principles and risk management.

##### **Module 5: Investment Principles and Risk II**

- Advanced techniques in investment principles and risk management.

##### **Module 6: Pensions and Retirement Planning I**

- Basics of retirement planning.

##### **Module 7: Pensions and Retirement Planning II**

- Advanced retirement planning strategies.

**Module 8: Protection I**

- Introduction to protection strategies in financial planning.

**Module 9: Protection II**

- Advanced protection strategies.

**Module 10: Financial Planning Practice I**

- Basics of financial planning practice.

**Module 11: Financial Planning Practice II**

- Advanced techniques in financial planning practice.

**Module 12: Financial Statement Analysis I**

- Introduction to analyzing financial statements.

**Module 13: Financial Statement Analysis II**

- Advanced techniques in financial statement analysis.

**Module 14: Financial Planning Ethics**

- Understanding and applying ethical standards in financial planning.

**Module 15: Strategic Financial Management I**

- Basics of strategic financial management.

**Module 16: Strategic Financial Management II**

- Advanced techniques in strategic financial planning.

Websites:

- <https://chools.in/>
- <https://ramaqchools.com/>
- <https://www.choolsgroup.com/>