



JNICSR

Jawaharlal Nehru Institute
of Corporate Social Responsibility

SYLLABUS

Jawaharlal Nehru Institute of Corporate Social Responsibility (JNICSR)

Advanced Certification in Wealth Management

Awarding Institution: JNICSR FOUNDATION

Teaching Institution: JNICSR FOUNDATION

Programme length: 4 Months

For students entering in 2018

Date of specification: 2018

Board of Studies: Certificate Courses

Eligibility: Graduation (Any Stream)

Advanced Certification in Wealth Management

We at JNICSR are proud to introduce a Advanced Certification in Wealth Management.

The 4 Months Advanced Certification in Wealth Management is aimed at the development of the trained and certified professionals for wealth management in the country. It is a distance learning program aimed at enhancing managerial as well as self entrepreneurship skills.

Those trained, it is envisaged, would be highly valued for their professional expertise and merit in the management field in India.

Admission is open and applicant can apply for the programme.

Contents

1. Introduction to Wealth Management
2. Types of Family Wealth
3. Wealth Management Market
4. Multi-Dimensional Challenges for Wealth Managers
5. Business Models in Global Wealth Management
6. Family Wealth Management
7. Investment Planning
8. Client Segmentation & Client Value Management
9. Life Cycle Management – Five Stages
10. Regulatory and Tax Issues
11. Portfolio & Risk Management

GRADING AND EVALUATION

Your grade in the course will be determined as follows:

- Article Submission – 10 Marks
- Online Exam 1 - 20 Marks
- Online Exam 2 – 25 Marks
- Assignment 1 – 20 Marks
- Assignment 2 – 25 Marks

All activities will receive a numerical grade of 0–100. You will receive a score of 0 for any work not submitted. Your final grade in the course will be a letter grade. Letter grade equivalents for numerical grades are as follows:

A	=	93–100	B–	=	80–82
A–	=	90–92	C+	=	78–79
B+	=	88–89	C	=	73–77

B = 83–87 F = Below 73

To receive credit for the course, you must earn a letter grade of C or higher on the weighted average of all assigned course work (e.g., assignments, discussion postings, projects, etc.). Graduate students must maintain a B average overall to remain in good academic standing.

STRATEGIES FOR SUCCESS

First Steps to Success

To succeed in this course, take the following first steps:

- Read carefully the entire Syllabus, making sure that all aspects of the course are clear to you and that you have all the materials required for the course.
- Take the time to read the entire Online Student Handbook. The Handbook answers many questions about how to proceed through the course, how to schedule exams, and how to get the most from your educational experience at JNICSR.
- Arrange to take your examination(s) by following the instructions in this Syllabus and the Online Student Handbook.
- Familiarize yourself with the learning management systems environment—how to navigate it and what the various course areas contain. If you know what to expect as you navigate the course, you can better pace yourself and complete the work on time.
- If you are not familiar with Web-based learning be sure to review the processes for posting responses online and submitting assignments before class begins.

Study Tips

Consider the following study tips for success:

- To stay on track throughout the course, begin each week by consulting the Course Calendar. The Calendar provides an overview of the course and indicates due dates for submitting assignments, posting discussions, and scheduling and taking examinations.
- Check Announcements regularly for new course information.

ACADEMIC INTEGRITY

JNICSR is committed to maintaining academic quality, excellence, and honesty. The College expects all members of its community to share the commitment to academic integrity, an essential component of a quality academic experience.

Students at JNICSR are expected to exhibit the highest level of academic citizenship. In particular, students are expected to read and follow all policies, procedures, and program

information guidelines contained in publications; pursue their learning goals with honesty and integrity; demonstrate that they are progressing satisfactorily and in a timely fashion by meeting course deadlines and following outlined procedures; observe a code of mutual respect in dealing with mentors, staff, and other students; behave in a manner consistent with the standards and codes of the profession in which they are practicing; keep official records updated regarding changes in name, address, telephone number, or e-mail address; and meet financial obligations in a timely manner. Students not practicing good academic citizenship may be subject to disciplinary action including suspension, dismissal, or financial holds on records.

Academic Dishonesty

JNICSR expects all of its students to approach their education with academic integrity—the pursuit of scholarly activity free from fraud and deception. All Online mentors and administrative staff members at the College insist on strict standards of academic honesty in course. Academic dishonesty undermines this objective. Academic dishonesty can take the following forms:

- Cheating.
- Gaining or providing unauthorized access to examinations or using unauthorized materials during exam administration.
- Submitting credentials that are false or altered in any way.
- Plagiarizing. (including copying and pasting from the Internet without using quotation marks and without acknowledging sources)
- Forgery, fabricating information or citations, or falsifying documents.
- Submitting the work of another person in whole or in part as your own. (including work obtained through document sharing sites, tutoring schools, term paper companies, or other sources)
- Submitting your own previously used assignments without prior permission from the mentor.
- Facilitating acts of dishonesty by others. (including making tests, papers, and other course assignments available to other students, either directly or through document sharing sites, tutoring schools, term paper companies, or other sources)
- Tampering with the academic work of other students.

Student Support Services

JNICSR offers our students a variety of resources and support to assist in their enjoyment and success while taking online classes. The JNICSR Writing Center, www.JNICSR.com is available all the time to assist students with understanding issues. The Online Tutor Program (OTP) provides tutoring services to JNICSR Students to offer invaluable expertise and first-hand knowledge of the course materials provided by the faculty. OTP tutors can assist students in

general study skills and study strategies as well as academic resources. Students can contact the OTP Office by email at jnicr@jnicr.com