



Insurance Institute of India, COI, Mumbai

Virtual Training Session on Comprehensive Financial Planning : Focus Insurance Planning (CVT)

6th November, 2025

PROGRAM COORDINATOR:

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PROGRAM DURATION:

1 day (CVT)

PROGRAM DATE:

6th November 2025

PROGRAM TIME(IST):

10.30 AM to 01.30 PM (3 Hrs.)

PROGRAM FEES:

₹ 1770/-

(₹ 1500/- plus 18% GST)

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PROGRAM CONCEPT AND OBJECTIVES:

Financial Planning is a process of identifying life goals and translating these life goals into financial goals and managing the finances in a way that will facilitate to achieve these goals. It will also serve as a tool to plan for unexpected financial eventualities in life. It involves the assessment of one's net worth, present and future sources of income, estimating future financial needs and working towards meeting those needs through proper planning and management of finances and ultimately achieving the goals. This requires a Comprehensive Financial Planning which includes Insurance Planning, Investment Planning, Retirement Planning and Tax Planning.

No financial planning is complete until it includes planning for contingencies of uncertain events during one's life. Personal risks like early death, disability, morbidity, risks pertaining to living too long requires mitigation. Life Insurance is an effective solution for the aforesaid risks. Life Insurance is also a saving tool which can be used for creating corpus to meet future financial goals. Therefore, knowledge of the insurance products of life insurance, health insurance and general insurance is essential in managing risk in financial planning.

Keeping this in view, College of Insurance has designed a one day '*Virtual Training (CVT) Rooms*' program on Personal Financial Planning and the role of life insurance with an objective to create understanding about all the elements of personal financial planning and how different life insurance product categories serve as effective tools to manage various risks in human life.

KEY TAKEAWAYS FROM THE PROGRAM:

The participants of the program will gain knowledge and insight into the following

- Life cycle needs and personal financial goals
- Personal Risks like early death, disability, morbidity, etc.,
- Risk management and risk management tools.
- Time value of money
- Risks associated with Financial Instruments
- How to make your Personal Financial Planning path risk proof
- Insurance products and Pension Products
- Comprehensive Planning and Monitoring
- Retirement planning

PARTICIPANT PROFILE:

Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors and persons who are interested in financial planning.

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