

**Program Concept and Objectives:**

Financial Planning is a continuous pursuit of meeting both short term as well as long term goals with prudence. It encompasses Insurance Planning, Retirement Planning, Investment Planning, Tax Planning and Estate Planning. Financial Planning process is quite comprehensive and all-inclusive and will provide end to end solutions to customers in various life stages. Customers are nowadays well informed with so much information available on the Internet and their expectations are very high from Advisors. They look for professionals with domain expertise. Financial Planning is also significant as it enables.

- Increase in the Average Ticket Size
- Successfully close the HNI calls with higher conversion
- Cross Sell and Upsell to the existing customer base
- Increase referral and work on repeat business
- Build a professional image as Financial Planner
- Have a Customer for Life

With this background in view, this Series of programs has been designed to comprehensively cover Individual Financial Planning, this module focusing on Retirement Planning.

**Key Takeaways of the program:** The program participants will have knowledge and insight into the following:

- Present Value/Future Value/Inflation Adjusted Rate of Return/Perpetual Annuity
- Retirement Planning
- Pension/Annuity Plans
- Immediate and Deferred Annuity Plans
- Types of Annuity Options
- Actuarial aspects relating to Pension Schemes

**Participant Profile:**

Sales Managers, Professional Advisors of Life Insurers, Club Members and Potential MDRTs.

**Program Fees:**

- Participants requiring residential facilities: Total amount Required – Rs. 12980/- i.e. (Rs. 11000/- plus 9% CGST + 9% SGST). (The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.  
Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.)
- Non-residential participants: Total amount Required – Rs. 9440/- i.e. (Rs. 8000/- plus 9% CGST + 9% SGST). (The fees cover tuition, course material and day boarding (i.e. breakfast, lunch and tea/coffee during tea breaks for actual days of training).)

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**Program Date & Duration:**

**24 to 25 February 2026, 2 days (CT)**

**Program Time (IST):**

**10.00 AM to 05.00 PM (6 Hrs. Every Day)**

**Program ID: CPL**