

## Virtual Training Session on Program on Financial Markets and ULIPs (CVT) on 18<sup>th</sup> August, 2025

### Program Concept and Objectives:

Unit Linked Insurance Policies combine Insurance as well as market linked investments and is a sought after product by new generation of customers. However, marketing ULIPs requires reasonable understanding about how financial markets operate and ULIPs work. Regulatory provisions mandate that the Advisors and officials involved in the marketing of ULIPs need to be trained on all these aspects on an ongoing basis to keep their knowledge updated and relevant. They should be able to understand the customers' risk appetite and help in aligning the same with the investor's financial goals, time horizon and brief on appropriate ULIPs and fund categories. The marketing personnel should be able to understand the Customized Benefit Illustration and explain the same to the prospective customer satisfactorily clarifying all the questions that may arise.

Keeping this in view, College of Insurance has designed a two day program on Comparative Analysis with an objective to create understanding about various investment strategies and how diversification serves as an effective tool in mitigating market risks.

COI has created '**Virtual Training (CVT) Rooms**' as a cost-effective mechanism for participants to equip themselves academically at their respective locations.

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

- Understanding Investment Options
- Risk and Return Management
- Financial Planning
- Regulatory and Tax Implications
- Product Suitability and Recommendation
- Benefit Illustration
- Fund Switches

**Participant Profile:** Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors, MF distributors and persons who are interested in selling market linked products.

Duration	Date	Time (IST)	Hours
One Day (CVT)	18 <sup>th</sup> August 2025	10.30 am - 01.30 pm	3 Hours

**Program Fees:** ₹ 1770/- (₹ 1500/- plus 18% GST)

**Program Coordinator:** Dr. Ramesh Kumar Satuluri (Email: [ramesh@iii.org.in](mailto:ramesh@iii.org.in), Contact No: 022-69654263)

**How to enroll:** [Click here for Registration](#) and for any help/queries please mail to [college\\_insurance@iii.org.in](mailto:college_insurance@iii.org.in).

**Certificate of Participation:** Online Certificate in PDF format will be issued to all the participants.

### Program ID : CPL

Ms. Nilambari Bagde	college_insurance@iii.org.in	022-69654234
Ms. Yogeeta Kulkarni		022-69654255
Mr. A. G. Madwal		022-69654254
Mr. P. H. Ekke		022-69654284
Ms. Akshara Nagpal		022-69654266
Ms. Meghna Shrivartkar		022-69654249
Ms. Sneha Pednekar		022-69654270
Ms. Mrunal Satam		022-69654216