

Classroom Training Session on Wealth Management (CT) 25th to 26th November 2026

PROGRAM CONCEPT AND OBJECTIVES:

In today's dynamic financial landscape, insurance advisors are expected not only to sell protection products but also to guide customers holistically on wealth creation, risk mitigation, and long-term financial planning. Customers increasingly demand integrated advisory support that aligns insurance solutions with broader financial goals. As a result, insurers are moving from a product-centric to a client-centric advisory model where wealth management knowledge is essential.

To strengthen the advisory capabilities of insurance professionals, a Wealth Management Classroom Session is proposed. The session aims to equip participants with the knowledge and skills required to better understand customer financial needs, design appropriate solutions, and provide comprehensive advisory services. The cost effective classroom format ensures convenience, scalability, and accessibility for geographically dispersed participants.

KEY TAKEAWAYS FROM THE PROGRAM:

By the end of the classroom session, participants will be able to:

Financial Planning

- Understand and apply the principles of goal-based financial planning.
- Conduct basic financial assessments, including cash flow, savings, and investment capacity.
- Explain long-term wealth creation strategies and retirement planning options to clients.

Risk Protection

- Identify various financial risks customers face across life stages.
- Recommend appropriate insurance solutions for income protection, asset protection, and long-term risk mitigation.
- Integrate protection and investment-based products into balanced financial plans.

Advisory Skills

- Engage customers with confidence in structured financial discussions.
- Demonstrate improved listening, probing, and analytical skills to understand customer needs.
- Present tailored insurance-led wealth management solutions ethically and professionally.
- Strengthen trust-based relationships, leading to higher customer satisfaction and loyalty.

PARTICIPANT PROFILE:

The program is designed for serious minded insurance practitioners who are working and/ or interested in the field of

- Life insurance advisors
- Bancassurance partners
- Financial consultants and relationship managers
- New recruits in sales and advisory teams
- Mid-level managers supervising advisory-driven roles

PROGRAM TEAM:

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Program Date:

25 - 26 November 2026

Program Duration: 2 days (CT)

Program Time (IST):

10.00 am to 05.00 pm

Program Coordinator:

Dr. Ramesh Kumar Satuluri, Faculty,
Email: ramesh@iii.org.in,
Contact: 022-69654263

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).

Program venue:

College of Insurance, Insurance Institute of India,

Plot No. C-46, G-Block, Bandra-Kurla Complex, Mumbai - 400 051.

Please follow the link / scan QR Code for training venue



<https://qrqo.page.link/qs2Qb>

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