



Indian Institute
of Technology Patna
भारतीय प्रौद्योगिकी संस्थान पटना

PG Certification

Financial Planning & Investment Management

Your gateway to the pinnacle of wealth management

7 Months | Online | Immersive Sessions | Get certified from an IIT



LEARN FROM THE BEST MINDS IN THE COUNTRY - GET THE IIT PATNA ADVANTAGE

Established in 2008, IIT Patna is the newest and fastest-growing premier institution in India.

IIT Patna operates ten departments - Computer Science & Engineering, Electrical Engineering, Mechanical Engineering, Chemical, and Biochemical Engineering, Civil & Environmental Engineering, Materials Science & Engineering, Chemistry, Physics, Mathematics, and Humanities & Social Science departments.

The Institute has developed modern facilities that are fully equipped with state-of-the-art facilities (equipment software and machines) that are routinely used to train and educate students.

The Institution has published in high-quality and peer-reviewed national and international journals.

The faculty members of IIT Patna have a wide range of academic and research experience. They have been trained in the top-ranked Institutes within the country and abroad.

IIT PATNA - CREDENTIALS





Program Overview:

The financial world is changing dramatically, particularly with the rise of digital payments and AI financial advisors. The finance industry offers a variety of opportunities to suit a variety of skill sets and interests. A specialized curriculum called a Postgraduate Certification in Financial Planning and Investment Management is created to give people the knowledge and abilities they need to succeed in the finance and commerce sectors. The course covers a wide range of topics, including taxation, estate planning, risk management, portfolio management, and financial planning principles. The course equips learners with the expertise, qualifications, and information necessary to thrive in the fiercely competitive financial services sector.

Professionals who are looking to **transition to a career in financial or investment management.**

Business owners and entrepreneurs who want to manage their **finances more effectively.**

WHO IS THIS PROGRAM FOR?

Entrepreneurs who are looking to enhance their knowledge and **skills in finance and investment management.**

Graduates (with at least 1 year of work experience) who have completed a **finance-related degree and want to specialize for career enhancement.**

WHO CAN APPLY? - COURSE ELIGIBILITY

- The program is designed for graduates in any discipline with a minimum 1 year of work experience.

COURSE STRUCTURE

Program Duration - 7 months

Model of delivery - Virtual instructor-led training (VILT)

Components	Learning Effort (Hours)
No. of VILT sessions	44 hours
Student engagement – Live chat, discussion forums, webinars, expert sessions	4 hours
Guided sessions - Project	10 hours
Self-Learning	48 hours
Total	106 hours

Note: The list mentioned above is indicative and is subject to change at the discretion of IIT Patna.



HANDS ON EXPERIENCE THROUGH



PROGRAM OBJECTIVES

- **DEVELOP** - A Solid foundation in financial planning principles, including risk management, taxation, estate planning, and retirement planning.
- **LEARN** - About various investment strategies and products, including stocks, bonds, mutual funds, exchange-traded funds, and alternative investments.
- **GAIN** - An understanding of portfolio management concepts, such as asset allocation, diversification, and rebalancing.
- **ACQUIRE** - Familiarity with compliance and regulatory issues related to financial planning and investment management, including relevant laws and regulations.
- **STUDY** - How to analyse investments using various techniques, including fundamental and technical analysis, to evaluate the risks and returns of different investment options.
- **UNDERSTAND** - How to effectively communicate with clients and manage client relationships in a professional and ethical manner.



THE LEARNING CURRICULUM

Module	Module Title	Learning Objectives	Topics
1	Introduction to Financial Planning	<ul style="list-style-type: none"> • Learn the basics of financial planning • Become familiar with financial regulations and the regulatory bodies responsible for overseeing financial markets and products 	<ul style="list-style-type: none"> • Introduction to financial planning • investment planning & asset management • Regulatory environment & legal compliances
2	Retirement and Tax Planning	<ul style="list-style-type: none"> • Learn about asset management and the strategies used to manage and optimize investment portfolios • Gain an understanding of retirement planning and the various retirement planning options available. 	<ul style="list-style-type: none"> • Retirement planning & employee benefits • Tax planning • Estate planning
3	Risk and Wealth Management	<ul style="list-style-type: none"> • Apply risk and return principles to investment decision making • Learn about investment psychology, including the role of risk perception, optimism, and herding behaviour in investment decisions. • Learn the principles of wealth management and the strategies used to manage and grow wealth 	<ul style="list-style-type: none"> • Risk management & insurance • Behavior finance • Wealth management
4	Financial Markets and Derivatives	<ul style="list-style-type: none"> • Understand the structure and function of financial markets, including primary and secondary markets, stock exchanges, and bond markets. • Learn the structure and function of derivatives markets, including exchange-traded and over-the-counter markets, and the regulatory framework for derivatives trading. 	<ul style="list-style-type: none"> • Financial markets • Financial derivatives- option, futures etc
5	Investment Management	<ul style="list-style-type: none"> • Explain the role of investment banks in the financial system • Evaluate the financial health and performance of a company using financial analysis • Analyse mergers and acquisitions (M&A) and other advisory services provided by investment banks. 	<ul style="list-style-type: none"> • Introduction to investment management • Financial statements analysis • Investments analysis & portfolio management • Merger & acquisition

1	Financial Technology	<ul style="list-style-type: none"> Understand the stock analysis Understand the use of modelling techniques in Finance Analyse the impact of fintech on financial markets and institutions 	<ul style="list-style-type: none"> Fundamental and technical analysis Financial modelling (Spreadsheet modelling for finance) Fintech management: Introduction and its application in Finance Industry
6	Industry Project	<ul style="list-style-type: none"> Practical Learning 	<ul style="list-style-type: none"> Based on the overall curriculum

ASSESSMENT & ASSIGNMENTS

- Assessment or assignments modules are MCQ-based and problem-based
- Project Viva-Voce will be telephonic and web-based

FINAL EVALUATION

Final Evaluation will comprise of the following components and weights:

- Final Assessment – Multiple Choice Questions (50%)
- Project submission and Viva-Voce (50%)

Upon clearing a minimum of 50% in total, the student will be awarded the certification.

PG CERTIFICATION PROGRAM



IIT Patna campus immersion and executive alumni status is an optional add-on.

AN EYE ON THE FUTURE

The financial planning and investment management industry includes a wide range of companies, including banks, investment management firms, brokerage firms, insurance companies, and financial planning firms. The job market for financial planning and investment management professionals is generally strong, as individuals with the knowledge and skills to manage investment portfolios and help clients achieve their financial goals are in high demand. The size of the financial planning and investment management industry is also significant, as many individuals and organizations seek guidance on managing their finances and investments. This growth is attributed to the increasing complexity of financial markets and products. In addition, the demand for investment banking services, which includes underwriting and mergers and acquisitions, is also expected to increase in the coming years.

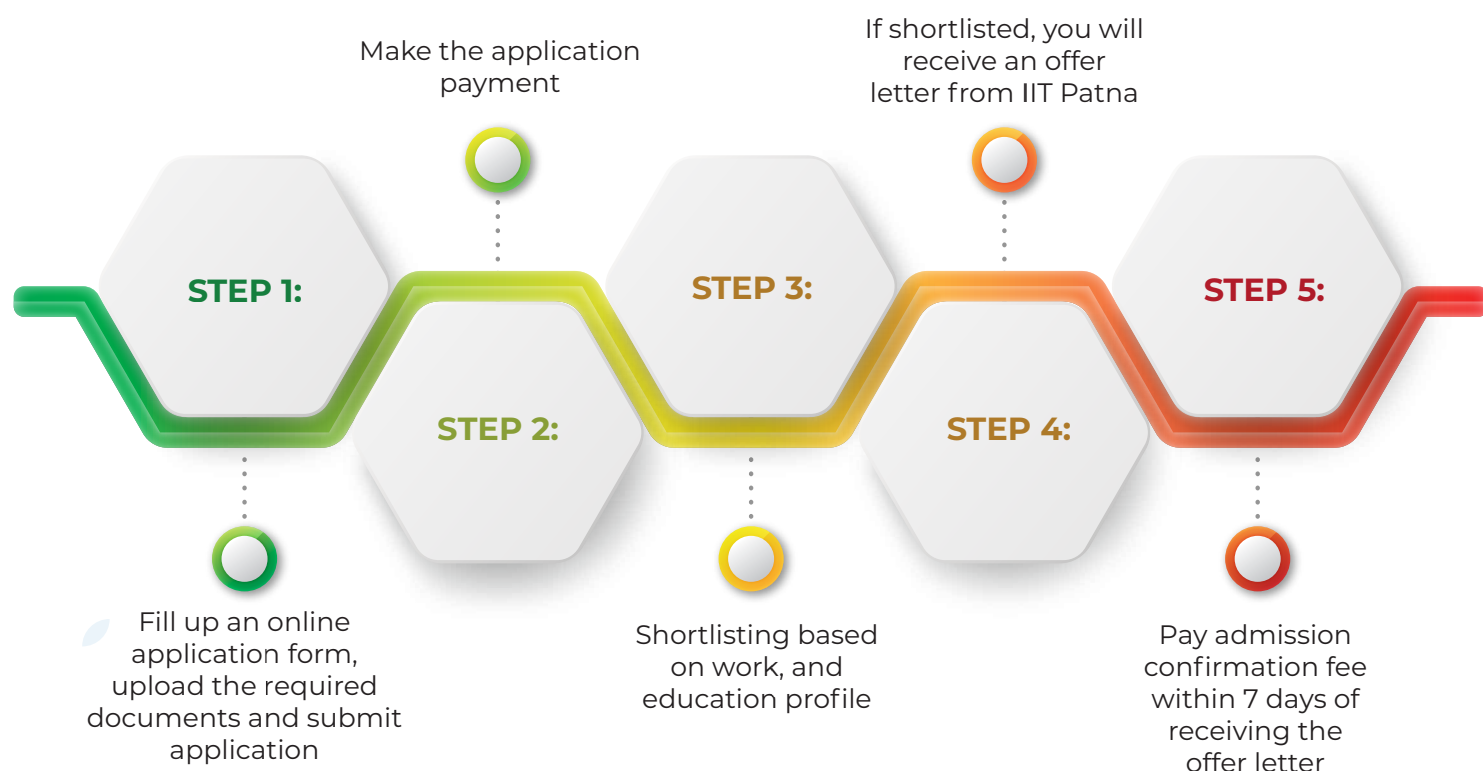
POTENTIAL JOB ROLES

Graduates of a certificate program in Financial Management and Investment Banking may be well-suited for a variety of roles in the financial industry in India. Here are some potential job titles and descriptions:

- Financial Planner
- Financial Analyst
- Investment Advisor
- Portfolio Manager
- Risk Manager
- Estate Manager
- Personal advisor
- Wealth Manager



PROGRAM ADMISSION JOURNEY



Note: The application fee once paid is not refundable. IIT Patna reserves the right to conduct the admissions process. By submitting the application, the students agree that any decision regarding Admissions from IIT Patna will be final and binding.

FEES SCHEDULE

Fee details	1 st EMI	2 nd EMI
Application Fee (non refundable)	₹ 5,000	-
Fee	₹ 30,000	₹ 30,000
Optional Campus Immersion Fee (5 Days)	₹ 7,000	
Optional Executive Alumni Status Fee	₹ 6,000	
Total Course Fee	₹ 60,000	

Points to note:

- Application fee is non-refundable and exclusive of course fees & optional fees. GST @18% applicable
- All students are requested to strictly adhere to the payment schedule deadlines mentioned in the above table.
- IIT Patna does not charge any processing fee or service charge from the students for online payment. However, online payment gateway charges, over and above course fees need to be borne by the students, as applicable.
- In case of any refund related queries, kindly refer to our refund policies.



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Contact us

For application and any other information please
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