



Dear Sir/ Madam

We are pleased to present an opportunity to collaborate with your esteemed institution to offer a specialized training program for students on SEBI Investor Awareness Exam. This initiative aims to enhance financial literacy among students and prepare them for SEBI's certification, equipping them with valuable investment knowledge, personal finance management and career-oriented skills.

Course Details

Course Title: Investor Awareness

Total Duration: 10 Hours (3 hours per day for 3 days+ Q&A)

Final Examination: SEBI Investor Awareness Exam

Additional Benefit: 1 Mock Tests for practice

Minimum Enrolment: 50 students

Course Objective: To provide foundational knowledge of personal finance, covering financial planning, investment options, risk management, and regulatory frameworks to enhance financial decision-making skills.

Services Offered

Training



Finmonk India's investor awareness and NISM programs blend theory, hands-on modules, live market sessions, and case studies to create confident, industry-ready financial professionals.

Mentoring



Finmonk India drives student success with personalized mentorship from experienced faculty and market veterans, offering career advice and skill-building for financial sector roles or consultancy ventures.

Nurturing



Finmonk India nurtures students with continuous feedback and encouragement in a supportive environment, fostering confidence and unlocking potential for their financial and professional goals.

Guiding



Finmonk India provides strategic guidance and step-by-step support to foster independent thinking, helping students choose certifications, prepare for finance roles, or launch ventures for success.

Developing



Finmonk India shapes students into visionary leaders and professionals through academic rigor, practical exposure, and entrepreneurial training to transform the financial industry and their futures.

Module Breakdown

Module 1

Introduction to Personal Finance (2 Hours)

- Definition and Importance of Personal Finance
- Key Components: Income, Expenses, Savings, Investments, Insurance
- Financial Goal Setting and Budgeting

Module 2

Financial Planning & Savings Products (2 Hours)

- Basics of Financial Planning (Short-term, Medium-term, Long-term)
- Emergency Fund and its Importance
- Overview of Savings-Related Products:
 - Bank Deposits (Fixed, Recurring)
 - Post Office Savings Schemes
 - Public Provident Fund (PPF)

Module 3

Investment Options and Risk Management (2 Hours)

- Investment in Securities Market:
 - Equity, Debt, Mutual Funds
 - Systematic Investment Plans (SIP)
- Risk vs. Return Considerations
- Insurance as a Risk Mitigation Tool:
 - Life Insurance vs. General Insurance
 - Health Insurance and Its Importance

Module 4

Government Schemes, Tax Saving & Financial Safety (3 Hours)

- Overview of Government-Backed Schemes:
 - Sukanya Samriddhi Yojana (SSY), National Pension System (NPS)
 - Senior Citizens' Savings Scheme (SCSS), Atal Pension Yojana (APY)
- Tax Saving Options under the Income Tax Act
- Caution Against Ponzi Schemes & Unregistered Investment Advisers
- Basics of Grievance Redressal Mechanisms (SEBI, RBI, IRDAI)

Institution's Role

- Provide necessary infrastructure (classroom setup, projector, seating, etc.)
- Promote the program among students and encourage participation
- Provide printout for practice tests
- Ensure a minimum of 50 students enrol in the program
- Arrange lodging and boarding for the trainer for all three days

Our Role

- Deliver structured training by finance professionals
- Provide Softcopy of study materials
- Facilitate registration for the SEBI examination

Expected Outcomes

- Enhanced financial literacy and investment awareness among students
- Certification through the SEBI Investor Awareness Exam
- Increased employability and entrepreneurial opportunities in finance
- Knowledge of personal finance management

We would be delighted to discuss this proposal further and explore how we can customize the program to best fit your institution's requirements. Kindly let us know a convenient time for a meeting to finalize the collaboration details.

Looking forward to a successful partnership.

Trainer

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