**Tax Insurance and Retirement Planning**

**April 2022 Examination**

**Q1. You are the head of training and development in Tata AIA. Tata AIA has collaborated with elite institutes to create awareness on Insurance among these college students. As a trainer, explain the purpose, need, and benefits of Insurance using real-life examples. Also, explain the different kinds of Life Insurance products available in the market to the students. (10 Marks)**

**Introduction:**

There is no doubting that understanding you and your loved ones are financially relaxed against various unanticipated circumstances can give you extra peace of mind. Existence's uncertainties might arise at any time, including an untimely death or a medical emergency. Accidents or damage to your car, assets, or other gadgets are examples of these scenarios. Managing the financial results of these activities would possibly burn a hole in your wallet. You could use your financial savings or your family's tough-earned coins. As a result, you and your family require

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**Q2. You are a portfolio manager with JP Morgan Chase for HNI clients. Given the Covid 19, there has been too much volatility in the market, and your clients are dissatisfied with their portfolio performance. You have the responsibility of managing the portfolio of your 100 clients. What are the risk mitigation strategies you would adopt to avert the risk? (10 Marks)**

**Introduction:**

Risks are present in nearly every important business choice, as we all realize. Even supposing choice-makers reject a possibility because it appears to be too unstable, that selection might be risky in and of itself. Being too cautious can also result in new markets not being sought, new items not being produced, or competitors are gaining apart and, as a result, having a thorough, data-subsidized plan in location to display and manipulate chance. Fortunately, today's era allows companies to create risk mitigation measures to the maximum extent possible. Before any

**Q3. Ruchika is your friend in her early 30s, and she does not know much about investment products. You are working as a financial advisor with XYZ firm. As her friend, it's your responsibility to help her understand the importance of retirement planning**

**a. How would you explain and convince Ruchika for Retirement Planning. (5 Marks)**

**Introduction:**

Every retirement strategy is fantastic. Retirement planning is making preparations now for your destiny existence so you can also retain to pursue all your desires and targets on your very own. Setting retirement goals, predicting the amount of money you will need, and investing in growing your retirement savings are all a part of this process. In the end, you can have precise

**Qb. What are the different aspects you would suggest Ruchika consider for Retirement Financial Planning? (5 Marks)**

**Introduction:**

The technique of determining retirement income goals and the movements and decisions required to meet one's desires is called retirement planning. Figuring out resources of earnings, predicting prices, executing a savings application, and dealing with assets and risk are all part of