**Marketing of Financial Services**

# September 2022 Examination

**Q1. Design a Financial Literacy program for an Asset Management Company (Mutual Fund) of your choice. (10 Marks)**

**Ans 1.**

**Introduction**

**Defining financial Literacy -** Is the knowledge and application of different forms of financial acumen. These may encompass understanding how credit works, creating finances, and saving for retirement. Financial literacy encompasses the expertise of diverse economic instruments, such as ETFs, stocks, and bonds, and creating an investment plan. The Asset control company (Mutual Fund) of my choice is HDFC Mutual Fund. This company's applications will be added through application-based training and online education that will be eco-certified by each ITS SAMPLE ASSIGNMENT ONLY

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**Q2.** **Structure a better alternative to the Child Plans offered by Life Insurance companies. The alternative suggested should cover both a life insurance plan as well as an investment avenue. (10 Marks)**

**Ans 2.**

**Introduction**

The profound joy of welcoming a baby into your family is matchless. Limitless anticipation can even change into unlimited celebrations. A baby changes the sector in any own family. Due to this new arrival, your goals as parents end up more significantly pleasant too. A profession-deserving education could support a lavish wedding, a high-flying profession, and the kid's future needs because the natural continuation comes to the fore. One may additionally tend to overlook their other responsibilities (within the excitement), taking care of aging parents, buying

**Q3. SumitAswani, aged 34 years, working with a pharma company, has approached you for preparing his Financial Plan. He earns a salary of Rs. 21 lakhs per annum. His wife Prerna, aged 32 years, is a homemaker. They have one son Kabir, aged 3 years. (You can make any assumptions to further build up your case.)**

1. **Sumit and Prerna want to start investing in Kabir's higher education. Develop an investment strategy to help them achieve their goal. (5 Marks)**

**Ans 3a.**

**Introduction**

In accord with Sumit and Prerna's wish to start investing in Kabir's higher education, I might advise LIC's "New children's cash back Plan". It's a traditional, non-connected, taking part, and money-back plan. It is a tailor-made plan via Survival benefits that cater to schooling, marriage, and different extraordinary forms of wishes of growing kids. Moreover, it offers a

1. **Sumit has expressed his desire to retire by the age of 55. Design a retirement plan for him. (5 Marks)**

**Ans 3b.**

**Introduction**

If anyone like Sumit is 55 years of age and desires to retire at that age, he needs the right retirement plan. For this kind of human, a retirement benefits scheme wishes to be planned.

Whether anyone plans to retire late, early, or in no way but has an ok amount of money saved, it is fit for making all the difference, psychologically and financially. Your recognition needs to be