



Army Institute of Management & Technology **and Financial Planning Standards Board, India**

Management / Faculty Development Program

on

"Investment Planning & Tax Management in Digital Era"

Theme

In today's rapidly evolving digital landscape, navigating the complexities of Investment Planning and Tax Management requires a strategic and informed approach. This Management and Faculty Development Program delves into the nuances of financial decision-making in the digital era. Participants will explore topics such as Investment Planning, Risk and Estate Planning, Retirement Planning, Insurance Planning, and Tax Planning, all tailored to the challenges and opportunities which an individual faces in the evolving digital age. AIMT in association with FPSB India is organising the FDP/MDP on the above theme.

The main objectives of the proposed MDP/FDP are:

- Explore the unique challenges and opportunities presented by the digital era in the realm of investment planning and taxation.
- Equip participants with the latest strategies and tools for effective investment planning in the dynamic digital environment.
- Delve into the intricacies of risk and estate planning, leveraging for optimal decision-making and risk management.
- Learn to design retirement plans that align with individual goals, considering the evolving financial landscapes.
- Understand the nuances of insurance planning, integrating digital resources to mitigate risks and maximize coverage benefits.
- Navigate the intricacies of tax planning in the digital age, ensuring compliance and optimizing tax benefits.

About AIMT

AIMT, Greater Noida was established by Army Welfare Education Society (AWES) in Aug 2004 with the aim of providing quality education in the field of Management to the wards and widows of Army personnel. AIMT is affiliated to Guru Gobind Singh Indraprastha University, Delhi and is also NAAC Accredited; ISO 9001: 2015 Certified Institute. Equipped with all modern learning tools/facilities, the Institute aims to provide top class management education to the wards of Army Personnel. The Institute is also actively engaged in providing management consultancy services. The Institute has reached out to global extensions for giving an international outlook to the students by MOUs with Tamansiswa Palembang University (Indonesia) and Westford School of Management, Sharjah (UAE). AIMT has more than 19 years of glorious presence in the

field of management education with projects like Indian Golf Union, setting up an incubation centre at Government Institute of Medical Sciences, training more than 1000 Judicial Officers of UP and many more projects to its credit.

About FPSB India

FPSB India is the leading financial planning body in India and is dedicated to establishing, upholding and promoting professional standards in financial planning throughout India. FPSB India offers the globally recognized CFP certification, which represents excellence in financial planning through rigorous competency and ethical standards. It is home to over 2,517 CFP professionals in India and part of a global network of organizations representing more than 213,000 CFP professionals worldwide.

FPSB India is the Indian subsidiary of Financial Planning Standards Board Ltd., the global standards-setting body for the financial planning profession and owner of the international CERTIFIED FINANCIAL PLANNER certification program.

Who can Participate: By participating in this FDP/MDP, individuals will gain the knowledge and tools necessary to navigate their financial journey successfully, regardless of their current level of financial expertise. Whether starting on the path to financial mastery or looking to enhance existing skills, this program is tailored to empower participants to achieve their financial goals.

- Individuals / Non- Finance Individuals
- Faculty Members
- Management Professionals
- Financial Advisors

Program Outline:

- **Investment Planning**
- **Investments in Digital Era**
- **Risk and Estate Planning**
- **Insurance Planning**
- **Retirement Planning**
- **Tax Planning**

Venue and Duration

The program is scheduled to take place in a hybrid format, with sessions conducted both on campus at AIMT and through MS Teams. The time for session is **11.30 am to 4.30 pm** from **10th January to 16th January 2024**.

Online Fee INR 600 /- (Rs. Six Hundred Only)

Offline Fee INR 2000/- (Rs. Two Thousand Only) Including Refreshment and Lunch

Special Discount

Three or more participants from one organization: INR 100 (per person for Online Mode) and 200 (Offline Mode)

Registration

The filled-up registration form should be sent to us along with the course fee through Cheque/Demand Draft/NEFT in the name of Army Institute of Management & Technology College Fund.

Bank Details:

UPI:



For NEFT:

Bank Name: Punjab National Bank
Branch: IEML Greater NOIDA
Account No: 12282191095231

IFSC: PUNB0122810

The last date for the receipt of nominations for the program is 8th Jan 2024. It will be highly appreciable if the nominations are sent to AIMT by then to enable the organizer/coordinator to plan for the program accordingly. Kindly visit the below-mentioned link to register for the FDP.

Registration Link for FDP/ MDP:

<https://forms.gle/7D9YSE7AqpDUjzRWA>

Speaker's Profile:

Mr. Krishan Mishra,
CEO, FPSB India



Mr. Arun Thukral,
Chairperson of CFP Advisory Council at FPSB India,
Professor of Practice, Angel Investor,
Former MD & CEO Axis Securities,
Author of 'Yogi on Dalal Street'



Mr. Anshul Srivastava,
AVP- Standards & Certification- FPSB India,
Founder & Chief Mentor, Finance Wizards



Mr. Udayan Ray,
Personal Finance Expert, Certified Financial Planner (CFP)
Seasoned Economic Analyst, Digital Edupreneur,
Financial Education Evangelist, Noted Speaker



Dr. Anubhav Varma,
Associate Professor (Finance)
Academic Head, AIMT, Greater Noida



Dr. Dharini Raje Sisodia,
Assistant Professor (Finance)
AIMT, Greater Noida



Prof. Sandeep Kumar Sahu,
Trainer: Taxation & Finance,
Assistant Professor (Finance)
AIMT, Greater Noida



Management Committee:

Patron:

Lt Gen Bhavnish Kumar, VSM
GOC Delhi Area

Chairman:

Maj Gen Sumeet Mehta, VSM
COS Delhi Area

FDP Chair

Dr. J.K. Sahu, Air Commodore (Retd),
Director, AIMT, Greater Noida

FDP Convener: Dr. Anubhav Varma, Assoc. Prof.
(Academic Head) AIMT, Greater Noida

FDP Co Convener:

Dr. Dharini Raje Sisodia, Asst Prof(Fin)
AIMT, Greater Noida

Prof. Sandeep Kumar Sahu, Asst Prof(Fin)
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Location Map:

