



MANIPAL UNIVERSITY
JAIPUR

MUJ/Q&C/021/F/1.01

Event Report Format



MANIPAL UNIVERSITY
JAIPUR

FACULTY OF MANAGEMENT & COMMERCE

SCHOOL OF BUSINESS & COMMERCE

DEPARTMENT OF COMMERCE

Career in Financial Planning

13 April, 2022

**Head
Department of Commerce
Manipal University Jaipur**



Content of Report

1. Introduction of the Event
2. Objective of the Event
3. Beneficiaries of the Event
4. Details of the Guests
5. Brief Description of the event
6. Photographs
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8. Schedule of the Event
9. Attendance of the Event
10. News Publication
11. Feedback of the Event
12. Link of MUJ website



1. Introduction of the Event

The Event has been conducted on “Career in financial planning” by Financial Planning Standard Board. The session has been taken up by Mr Rahul Agrawal, Head-Training, Institute for financial literacy, Jaipur. Trainer talks about the skill set required for financial planning. To do personal finance what need to be taken care of. Career opportunity in financial planning for the students is being elaborated

2. Objective of the Event

- The objective of the event to make student understand the importance of financial planning and opportunities available for youth in financial planning as a career.

3. Beneficiaries of the Event

Students and the faculty members are the beneficiaries who got insight about the ups and down of market.

4. Details of the Guests

Mr Rahul Agarwal Conducting training sessions for professionals and students. He is holding position of Head-training in Institute for financial literacy, Jaipur.

5. Brief Description of the event

The event has been conducted to make student aware about the career opportunities available in financial planning. Speaker discussed about the skill set required by a profession to grab the opportunities in this sector. He also elaborated the career aspects in financial planning in terms of tax consultant, wealth advisor, portfolio manager, mutual fund distributor and all. Speaker also spoke about the importance of CFP in USA.

6. Screenshots of the event

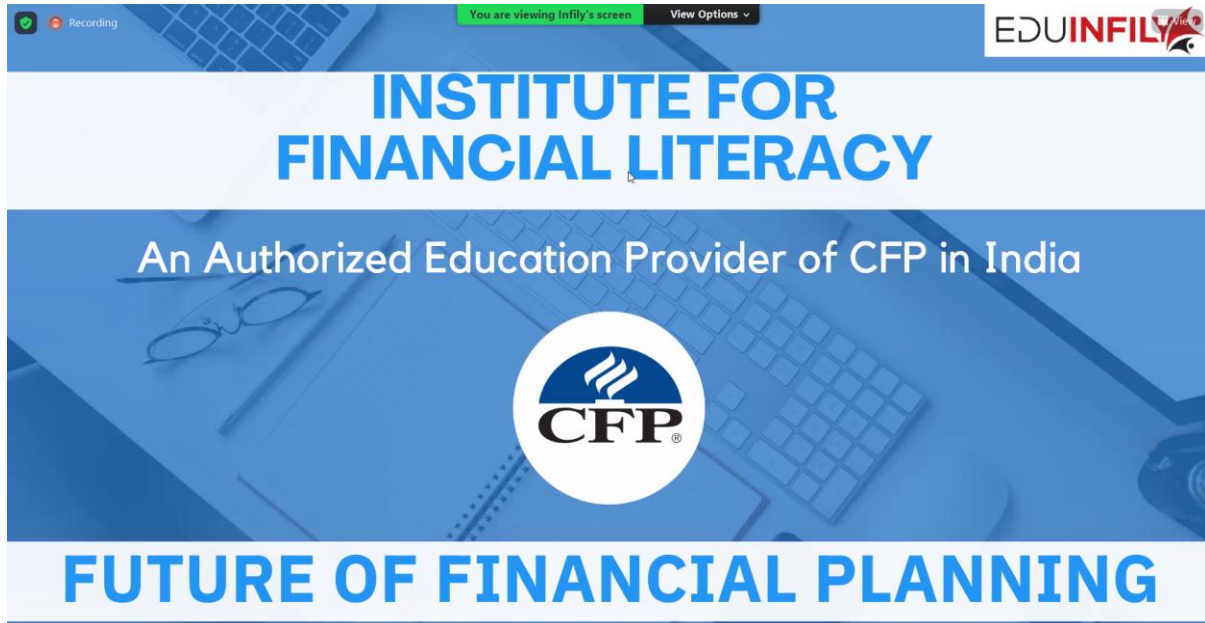


Figure 1 Dr Tanushree inviting Guest Speaker

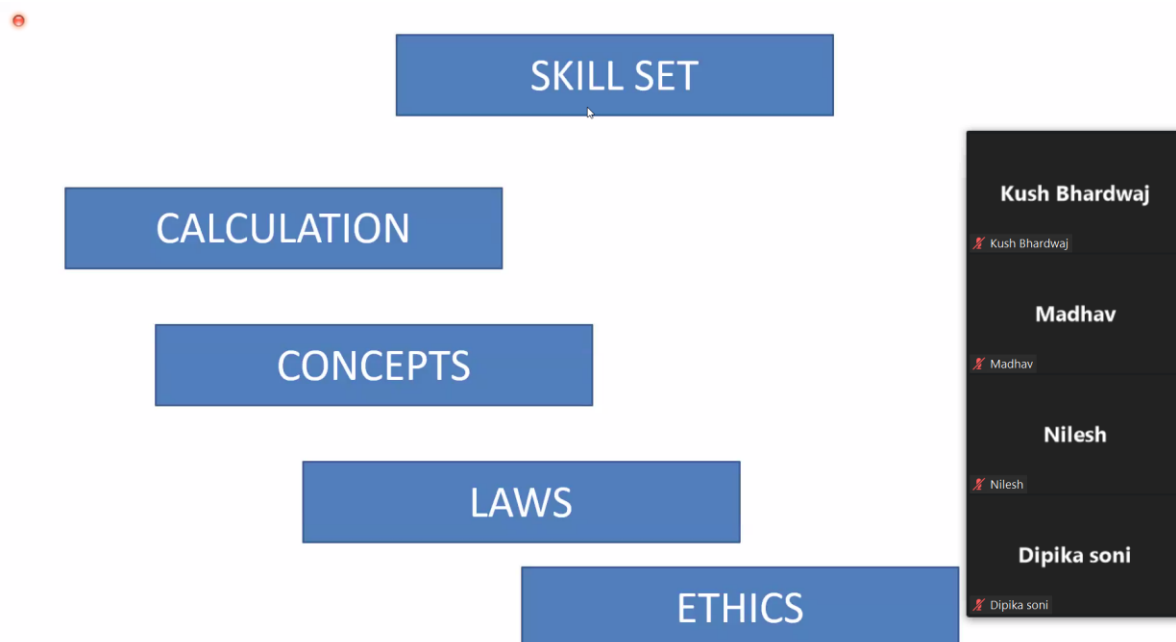


Figure 2 Mr agarwal explaining the skill set required for financial planning

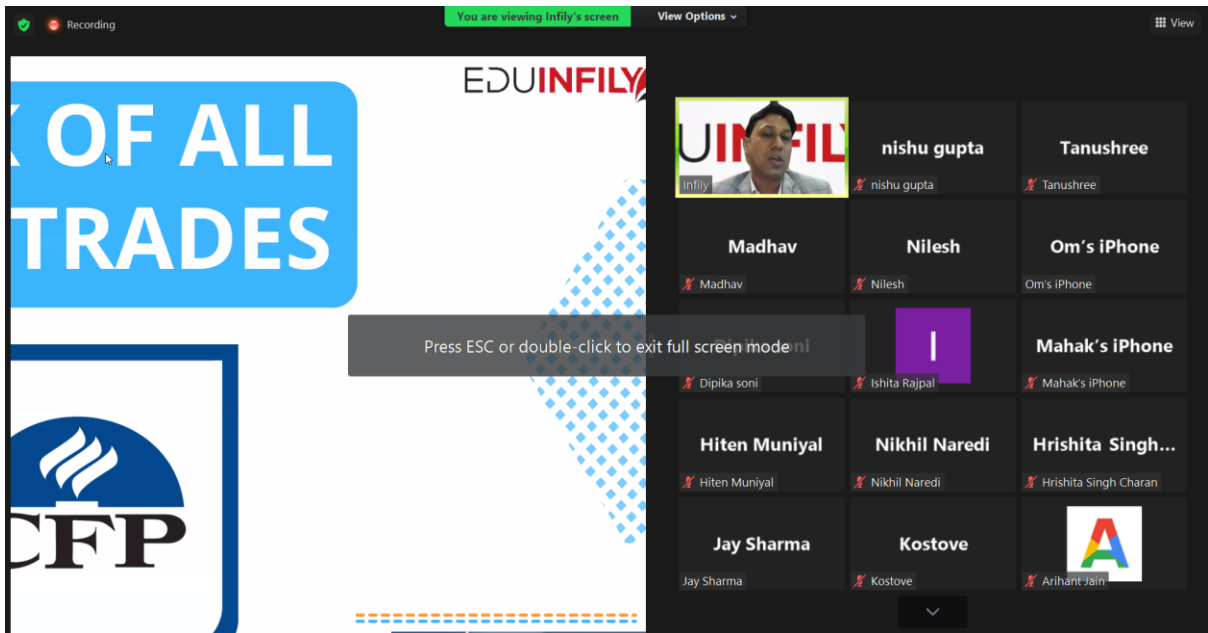


Figure 3 Discussing importance of financial planning in USA



The screenshot shows a presentation slide with the following content:

- Top right: EDUINFILY logo
- Top center: "You are viewing Infily's screen" and "View Options" button
- Section Header: **CFP COVERS THE WHOLE SPHERE OF PERSONAL FINANCE**
- Three FPSB® Specialist boxes:
 - FPSB® Investment Planning Specialist** (orange border)
 - FPSB® Retirement & Tax Planning Specialist** (green border)
 - FPSB® Risk & Estate Planning Specialist** (red border)
- Bottom center: **CFP** logo
- Right sidebar (black background):
 - Kush Bhardwaj**
 - Kush Bhardwaj
 - Madhav**
 - Madhav
 - Nilesh**
 - Nilesh
 - Dipika soni**
 - Dipika soni

Figure 4 aspect of personal finance is being discussed

EXAMINATION

- ➔ Online Exams take place on the mettle platform
- ➔ Every month 7 days window is available for booking exams
- ➔ No cap on Maximum attempt
- ➔ Calculator & spreadsheet allowed in exam for calculation

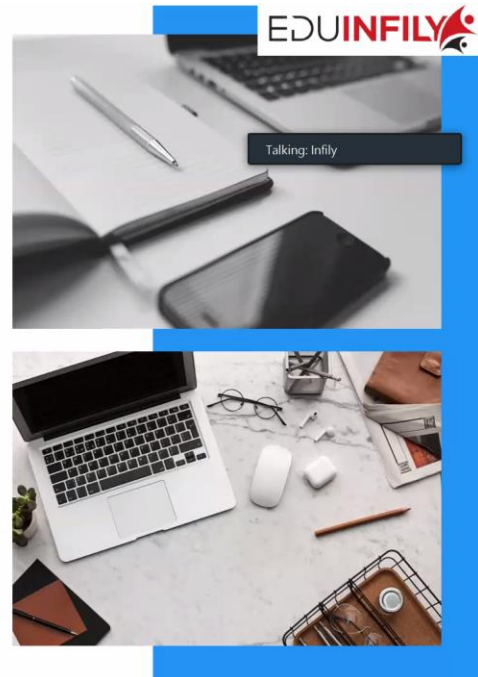


Figure 5 How to become certified financial planner- steps discussed



**CAREER OPTIONS
POST CFP**

- 1 Financial Advisor
- 2 Investment Banker
- 3 Wealth Advisor
- 4 Portfolio Manager
- 5 Mutual Fund Distributor
- 6 Estate Planner
- 7 Insurance Advisor
- 8 Stock Broker
- 9 Tax Consultant
- 10 Personal Financial Planner
- 11 Trainer for personal finance products

Click to add notes

Figure 6 Career opportunities in Financial Planning



7. Brochure of the event



School of Business & Commerce

Organizing

Webinar

on

“Career in Financial Planning”

By

FPSB(Financial Planning standard Board)

13th April, 2022

(time 2:30 p.m.- 3:30 p.m.)

Resource Person

Mr. Rahul Agarwal

(Head-Trainings, Institute for Financial Literacy, Jaipur)

Convenor:

Dr. Tanushree Sharma

Co-Convenor:

Ms. Nishu Gupta

https://teams.microsoft.com/l/meetup-join/19%3ameeting_OWJmNWFmNmYtOWQzYiOOYjMOLTgzMDktZjVhYzRhY2VhODY4%40thread.v2/0?context=%7b%22Tid%22%3a%22a1608842-8390-4bfb-90af-89ae3ab30761%22%2c%22Oid%22%3a%220ece2f41-2107-409a-b379-79a19ac635cf%22%7d

8. Attendance of the Event

Total attendee-

Sr. No	Name of Institution	Registration Number/ Employee Code	Attendee Name
1	Manipal University Jaipur	MUJ0379	Dr Tanushree sharma
2	Manipal University Jaipur	MUJ0674	Ms Nishu Gupta
3	Manipal University Jaipur	Speaker	Mr Rahul Agarwal
4	Manipal University Jaipur	210903030	Nitesh Gupta
5	Manipal University Jaipur	210903004	Jani Manan Manishkumar
6	Manipal University Jaipur	210903007	Ashish Kumar
4	Manipal University Jaipur	210903026	Divyansh Gaur



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5	Manipal University Jaipur	200901121	Irish Karnani
6	Manipal University Jaipur	200901127	Kiran Choudhary
7	Manipal University Jaipur	200901128	Ashutosh Gupta
8	Manipal University Jaipur	200901130	VISHAL GOSWAMI
9	Manipal University Jaipur	200901134	Keshav Gehlot
7	Manipal University Jaipur	200901139	Avani Jain
8	Manipal University Jaipur	200901140	Sanchit wadhwa
9	Manipal University Jaipur	200901144	Himanshu nagwani
10	Manipal University Jaipur	200901151	Nilesh Kumar Dangi
11	Manipal University Jaipur	200901152	Parineeta Jain
12	Manipal University Jaipur	200901158	Mudita gupta
10	Manipal University Jaipur	200901166	Siddhaarthaa Chouhan
11	Manipal University Jaipur	200901167	Lakshay Mahipal
12	Manipal University Jaipur	200901174	Paranjay Paliwal
13	Manipal University Jaipur	200901192	Riya Agarwal
14	Manipal University Jaipur	200901202	KUNAL BHARTIA
15	Manipal University Jaipur	200901213	Utkarsh Sharma
13	Manipal University Jaipur	200901216	Manan Agarwal
14	Manipal University Jaipur	200901221	Aashish Raj
15	Manipal University Jaipur	200901224	VAIBHAV BHALLA
16	Manipal University Jaipur	200901234	Keshav goyal
17	Manipal University Jaipur	200901251	Kunal Sooji
18	Manipal University Jaipur	200901268	Yashika siddha
16	Manipal University Jaipur	200901271	Kavya khandelwal
17	Manipal University Jaipur	200901283	Aryan
18	Manipal University Jaipur	200901286	Ronak Shekhawat



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19	Manipal University Jaipur	200901292	Urvashi karamchandani
20	Manipal University Jaipur	200901303	Harsh birla
21	Manipal University Jaipur	200901035	Saksham Jain
19	Manipal University Jaipur	200903045	DEV RAGHUVANSHI
20	Manipal University Jaipur	200903046	YADHU VYAS
21	Manipal University Jaipur	200903047	Uttam agarwal
22	Manipal University Jaipur	200903048	KOMAL KUMARI SINGH
23	Manipal University Jaipur	200903049	VRINDA BALI
24	Manipal University Jaipur	200903050	DEV R PARIKH
22	Manipal University Jaipur	200903051	RAHUL KISHNANI
23	Manipal University Jaipur	200903052	KASHIKA SHARMA
24	Manipal University Jaipur	200903053	SHREYA THAKRE
25	Manipal University Jaipur	200903054	BHRAT
26	Manipal University Jaipur	200903055	FUHAD SHAHABIN K
27	Manipal University Jaipur	200903056	GAURAV CHAUHAN
25	Manipal University Jaipur	200903057	GAUTAM AGRAWAL
26	Manipal University Jaipur	200903058	SUJAL BADAYA
27	Manipal University Jaipur	200903059	ARJUN GOTHWAL
28	Manipal University Jaipur	200903060	DIYA SONI
29	Manipal University Jaipur	200903062	TUSHAR AGGARWAL
30	Manipal University Jaipur	200903063	VIKALP KUMAR AGRAWAL
28	Manipal University Jaipur	200903064	PARUL YADAV
29	Manipal University Jaipur	200901141	MANIKA MITTAL
30	Manipal University Jaipur	200903065	CHANCHAL
31	Manipal University Jaipur	200903045	DEV RAGHUVANSHI
32	Manipal University Jaipur	200903046	YADHU VYAS



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32	Manipal University Jaipur	200903049	VRINDA BALI
33	Manipal University Jaipur	200903050	DEV R PARIKH
34	Manipal University Jaipur	200903051	RAHUL KISHNANI
35	Manipal University Jaipur	200903052	KASHIKA SHARMA
36	Manipal University Jaipur	200903053	SHREYA THAKRE
34	Manipal University Jaipur	200903054	BHRAT
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37	Manipal University Jaipur	200903057	GAUTAM AGRAWAL
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39	Manipal University Jaipur	200903059	ARJUN GOTHWAL
37	Manipal University Jaipur	200903060	DIYA SONI
38	Manipal University Jaipur	200903062	TUSHAR AGGARWAL
39	Manipal University Jaipur	200903063	VIKALP KUMAR AGRAWAL
40	Manipal University Jaipur	200903064	PARUL YADAV
41	Manipal University Jaipur	200901141	MANIKA MITTAL
42	Manipal University Jaipur	200901011	Mehar Ahuja
40	Manipal University Jaipur	200901020	Tejaswi Ujwal
41	Manipal University Jaipur	200901023	Devansh garg
42	Manipal University Jaipur	200901029	Saral dasot
43	Manipal University Jaipur	200901033	Akshit kothari
44	Manipal University Jaipur	200901034	Uday Kaushik
45	Manipal University Jaipur	200901039	Mukul Agarwal
43	Manipal University Jaipur	200901044	Sahil Khan



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44	Manipal University Jaipur	200901050	Lakshay rathore
45	Manipal University Jaipur	200901051	Bhanwar Pratap Singh Rathore
46	Manipal University Jaipur	200901053	Anamaya Sharma
47	Manipal University Jaipur	200901057	Deepak Vijay

S. Singh

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Department of Commerce
Manipal University Jaipur