



Webinar Title: “Planning for Insurance & Investment”

Expert Speaker – Dr. Anil R. Menon, Mentor & Business Consultant

Webinar Date: 15/05/2021 | **Time:** 1500 HRS | **Duration:** 1 Hr. 30 Min.

About Webinar : -

The webinar will be an exposition of various financial instruments available for insurance and investments. It will help participants better plan their financial investments as per their individual risk profiles. The objective of the workshop is to help participants achieve their financial goals.

Webinar Coverage:-

The webinar will give a working knowledge to the participants to draw out a plan to achieve their financial milestones. Apart from investments the webinar will also focus on insurance planning so as to protect from unfortunate exigencies. In short the webinar will focus on the practical applications of financial planning concepts.

Speaker Profile:-



Dr. Anil R. Menon is a practicing financial consultant based in Mumbai. A postgraduate in management studies he has an experience of 25 plus years in the area of finance. Some of his clients include HDFC Group, Deustech Bank, Kirloskar Group etc. Training being his passion he has trained more than fifteen thousand participants in the area of finance over the years. As he explains in a very easy logical manner one of the key highlights of his sessions is the application of financial concepts.

‘Key Learnings’:

- 1) Appreciate the need for personal financial planning.
- 2) Outlay clearly the financial goals.
- 3) Examine the financial instruments for investments and insurances
- 4) Appreciate the risk profiling analysis of individual investors
- 5) Chalk out a plan to achieve the financial milestones.