PROGRAM INFORMATION FORMAT

Course Name	Women & Wealth
Course Name as on Certificate	Certificate on Women & Wealth
Certificate Issued by	IIM Jammu
Institute	Indian Institute of Management Jammu
Introduction	Managing the wealth effectively has become increasingly crucial in today's financial landscape. It is a holistic approach to managing a person or family's financial affairs. It goes beyond traditional investment management by encompassing various aspects of financial planning, including investment strategies, tax planning, estate planning, and retirement planning. Unlike traditional financial planning, which often focuses on specific areas, wealth takes a comprehensive view, coordinating and integrating all aspects of a one's financial life. Increasingly, women are reaching the upper levels of career success and are earning wealth like never before in history. And fortunately, we are seeing an increased corporate focus on supporting women in their income-earning years – from increased wage gap transparency to improved family leave policies, even dedicated inclusive investing efforts to help women manage their personal financial lives while they juggle the many competing pulls on their time. The women are becoming more financially self-dependent. In fact, the women are smart in earning, responsible spending and savings. But when it comes to investing with the proper asset allocation, somewhere when they are less-confident due to several personal, social and other factors. Hence, it is equally important that women are also equipped for what comes after the savings– in particular, that means having a comprehensive wealth plan. This program is a comprehensive and practical initiative designed to equip women professionals across all the fields for upskilling the essential skills required in the dynamic field of personal and household finances. The program delves into the intricacies of personal finance, covering topics such as need for the wealth management, understanding the behavioral biases and personal financial needs, goal-based strategies, and managing the personal wealth by portfolio construction and management of the same. A notable highlight is the emphasis on case studies where participants gain hands-on experience in constructing and utilizing financial knowledge for decision-making, and strategic planning. The program is of short-term duration, that allows women participants to enhance their financial insight without extended commitments.
Course Learning Outcomes	The successful completion of the program won't only add the substantial value to participants' professional profiles but the participants will learn to learn to set the long-term financial goals for future financial security, understanding the risk tolerance, personal financial needs and role of behavioral finance in decision making, optimum asset allocation through diversification and create the sustainable wealth plan, to eliminate the financial distress that lead to financial satisfaction and well-being.
Eligibility	• For Indian Participants - Graduates (10+2+3) or Diploma Holders (only 10+2+3) from a recognized university (UGC/AICTE/DEC/AIU/State Government) in any discipline.
Program Prerequisites	Basic understanding and interest in Finance/Financial Markets

Target Segment/ Who Should Attend	• Middle and top-level women managers working in corporate sector; or women professionals working in any field/area/industry/sector and desirous of deepening their knowledge about the management of personal finances and wealth management • The women house managers who are desirous of enhancing their financial confidence and autonomy by managing their personal and household wealth.
Type of Certificate	Certificate of Completion for participants successfully passing the evaluation criteria. Certification of participation for the rest.
Total No. of Hours	18
Fee	Rs. 18,000 + GST (Total: Rs. 21,240) (Early bird period: before 23:59 hrs on 15/10/2025), Rs. 20,000 + GST (Total: Rs. 23,600) (Post Early bird period)
Date	08/11/2025 to 30/11/2025 (Three sessions of 90 minutes each on the weekends, one on Saturday and two on Sunday)
Mode	Online
Pedagogy	This course will be taught by experienced faculty members and industry experts. The course utilizes a combination of theory, live casse studies and hands on practical approach in delivering the content.
Course Content	• Understanding basics of the wealth management • Building and managing potofolio • Goal based financial planning • Role of behavioral finance in wealth management • Basics of risk management and estate planning
Key Program Highlights/USP	• Designed by veterans in the field of wealth management and financial education • Practical insights backed by robust theoretical framework
Program Directors	Dr Harsha Jariwala & Prof. Amit Trivedi
Key Attractions for sessions	Hands on training and assignments