



**Sandip Foundation's
Sandip Institute of Technology & Research Centre, Nashik
Department of Management Studies
Academic Year 2021-22**

Guest/Expert Talk Lecture on “Financial Planning, Financial Literacy, Asset Allocation”

Event Title: Guest/Expert Talk Lecture on “Financial Planning, Financial Literacy, Asset Allocation”

Date: 23rd February 2022

Conduction Duration: 2Hours

Venue: MBA Class Room

Resource Person:

- 1. Mr.Paresh Sheth (Director, CASI, Newyork)***
- 2. Dr. Mitez Sheth (Director, CASI, Newyork)***

Coordinator: Prof Prabodhan Patil

Objective:

- 1. To build the students Financial Quotient***
- 2. To introduce the students to Financial Planning & Asset Allocation***

About The Program:

Department of Management Studies had organized a guest lecture session on “***Financial Planning, Financial Literacy, Asset Allocation***” for MBA Students. The Guest speaker for the same was ***Mr Paresh Sheth & Mr Mitez Sheth both of them are Director at CASI, which is a Newyork based firm*** . the session was arranged to introduce the students to the world of personal finances precisely financial planning & asset allocation. The speaker began with explaining the concept of savings, he pointed out that saving the resources particularly the money is in blood which we have inherited from our ancestors. He then pointed out difference between savings & Investments. Inflation is the main culprit which eats away our savings so in order to beat the inflation and achieve financial freedom one must a thorough knowledge of Personal Finances and must do Financial planning properly. By and large he said investment can be done in only three things Gold, precious metal and Business. He then introduces students to various financial assets which yield returns to cover the future expenses. As per the speaker

asset allocation is also crucial act which everyone must follow and get acquainted with so that in the fluctuating business environment out investment and capital remains protected.

Outcome:

1.Students came to know about various facets of Financial Planning

Photographs:





