

## Department of Management Studies (MBA)

**Academic Year 2024-25**

### Seminar Report on "Wealth Awareness seminar (FINANCIAL WELLNESS ENHANCEMENT)"

- **Event Title:** "Wealth Awareness seminar (FINANCIAL WELLNESS ENHANCEMENT)"
- **Date:** 17<sup>th</sup> October 2024
- **Conduction Duration:** 2 Hour
- **Venue:** E' Buiding, MBA Dept, SITRC.
- **Resource Person:** Mr. Bhushan Bhaskar Patkar (Sr. AVP UTI Mutual Fund)
- **Coordinator:** Prof. Pratiksha Bhujbal

#### **Objective:**

1. Provide foundational knowledge about personal finance, including budgeting, saving, and investing.
2. Help attendees identify and set realistic financial goals for both the short and long term.
3. Discuss effective strategies for accumulating wealth, including investment options and retirement planning.

#### **About the Program:**

The Department of Management Studies, in collaboration with Sandip TBI, organized a highly informative and engaging lecture titled "Wealth Awareness seminar (FINANCIAL WELLNESS ENHANCEMENT)" for students. This session aimed to assist students in aligning their passions with their career aspirations. The seminar's standout feature was its exceptionally guest speakers: Mr. Bhushan Bhaskar Patkar.

The Financial Awareness Literacy Program hosted a guest lecture by Mr. Bhushan Patkar, a financial expert, to enhance understanding of financial literacy. He emphasized the critical importance of financial awareness for making informed decisions about spending, saving, and investing. Mr. Patkar highlighted that poor financial management can lead to significant long-term consequences. The session covered essential aspects of personal finance, including budgeting, debt management, and the necessity of emergency savings, underscoring the importance of tracking expenses and creating realistic budgets to achieve financial goals.

Additionally, Mr. Patkar introduced the basics of investing, discussing various options such as stocks, bonds, and mutual funds, while stressing the significance of understanding risk and diversification in

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building a robust investment portfolio. He also addressed the role of financial institutions, encouraging attendees to leverage banking services and resources to better manage their finances. Real-life case studies illustrated the consequences of inadequate financial planning and the benefits of proactive financial management, making the information relatable and practical.

The lecture concluded with a dynamic Q&A session where participants asked about specific financial scenarios, and Mr. Patkar offered tailored advice on topics like student loans, credit scores, and retirement planning. Overall, the session was highly informative, leaving attendees motivated to enhance their financial knowledge and take actionable steps toward better financial health.

## Outcome:

1. Attendees gained a better understanding of budgeting, debt management, and saving, enabling them to make smarter financial decisions.
2. Real-life examples and personalized advice inspired participants to take practical steps toward better financial management, including investing and setting budgets.



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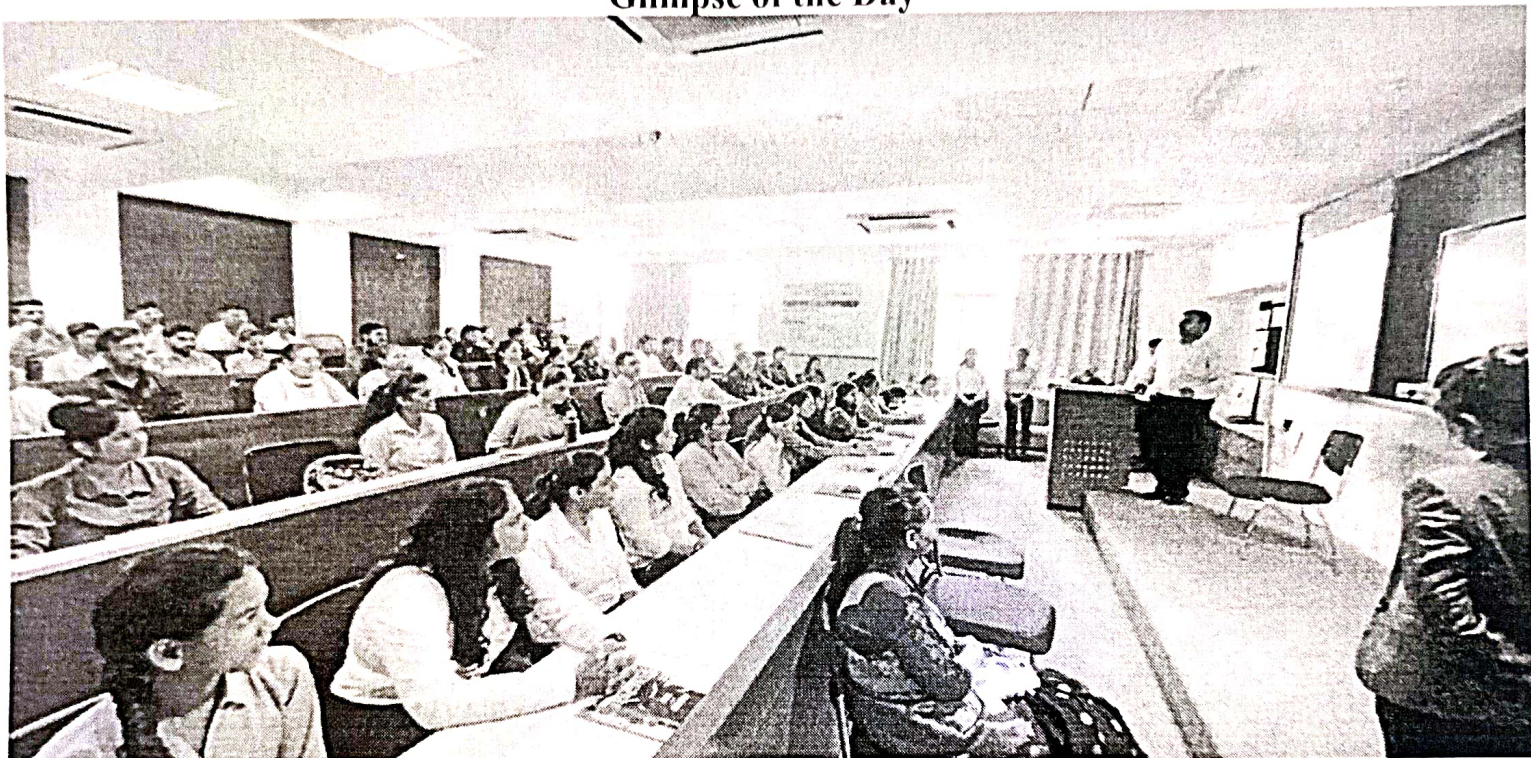
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## Glimpse of the Day





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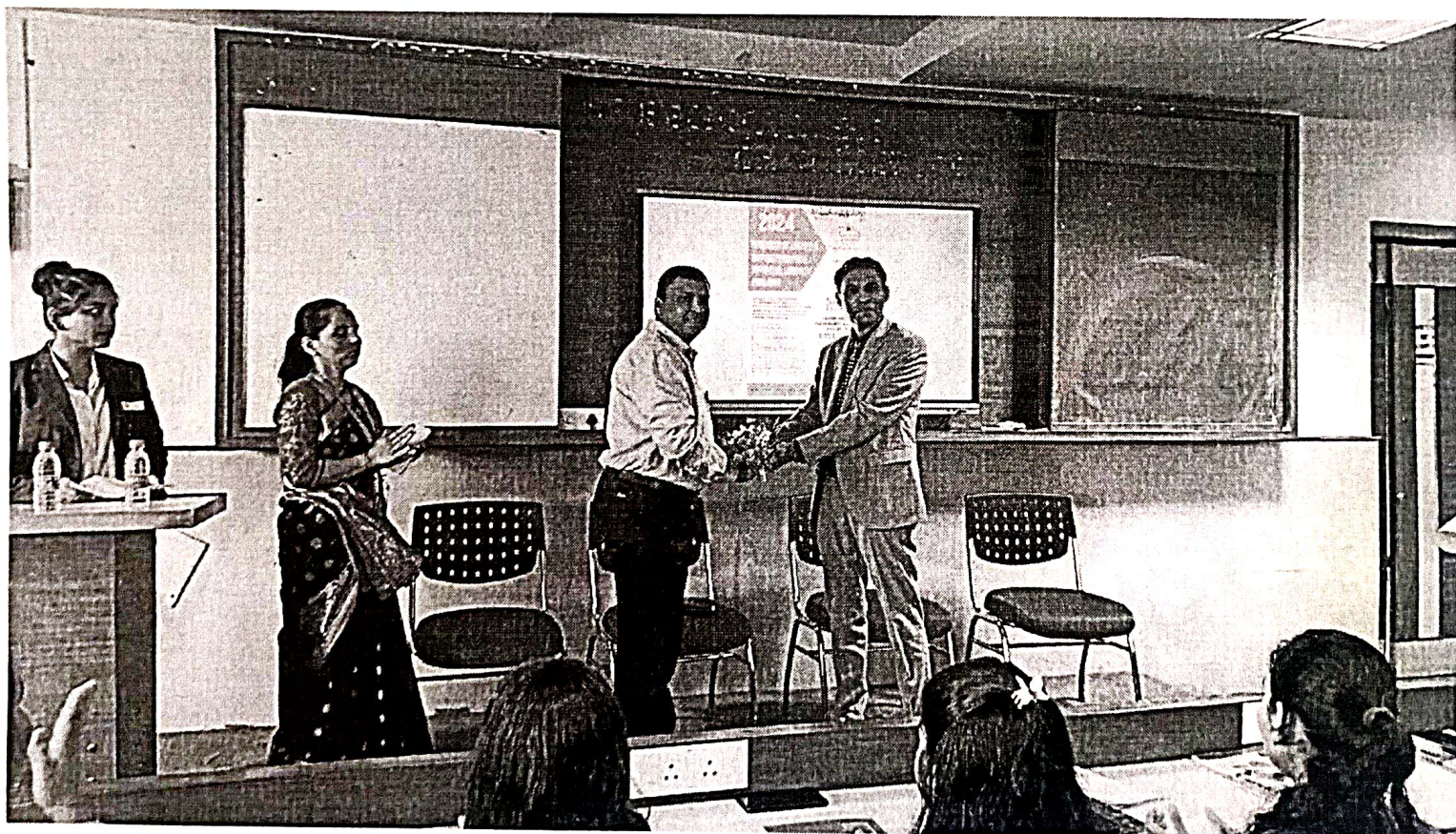
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