Roll No...............................

Department of Management

School of Management & Business Studies

JAMIA HAMDARD

Examination:- MBA (General, Winter) - 2nd year- Semester IV; Nov-Dec 2017

Wealth Management (Paper no. MBA-GE-FM 09)

Time - 3 Hours Max. Marks - 75

Instructions:

Write your Roll no. on the top right corner immediately on receipt of this paper.
Attempt any 5 questions.
Each question carries equal (15) marks.

Question 1 - What is meant by Wealth management? How is it related to financial planning? Discuss the steps involved in financial planning process. (5+3+7=15 Marks)

Question 2 - Explain the following terms with respect to wealth management: (3*5=15 Marks)

(a) Financial Plan; (b) Systematic Investment Plan (SIP); (c) Goal based financial plan; (d) Financial Blood test report; (e) Systematic transfer plan (STP)

Question 3 - Explain the relationship between wealth management and the state of economy. (15Marks)

Question 4 - Explain the role of different asset classes in wealth management process.(15 Marks)

Question 5 - What do you mean by risk profiling and asset allocation? Explain.(15 Marks)

Question 6 - Explain the concept of life insurance, health insurance and general insurance. How is it useful in wealth management?(10+5=15 marks)

Question 7 - Write a short note on exempted incomes as per Indian Income tax Act 1961.(15 Marks)

Question 8 - Briefly explain the main provisions of Sec 80C, Sec 80CCC and Sec 80CCD of the Indian Income Tax Act 1961.(15 Marks)

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