



Shiksha Mandal's

G. S. College of Commerce & Economics, Nagpur

An Autonomous Institution

(Affiliated to Rashtrasant Tukadoji Maharaj Nagpur University)

First Semester Master of Business Administration Examination (CBCS)

FINANCIAL PLANNING & WEALTH MANAGEMENT

(MBSF 1.2)

Time: 3 Hours

Maximum Marks: 80

N.B.: All questions are compulsory.

- Q. 1. Answer the following question in about 150-200 words. 10
- A) What is Personal Financial Statement? What precautions should be taken while preparing Personal Financial Statement?
- OR
- B) Explain in detail the items to be included in Personal Financial Statement. How does a Personal Financial Statement look like?
- Q. 2. Answer the following question in about 150-200 words. 10
- A) What is Financial Literacy? Explain the basics of it.
- OR
- B) Explain in brief the importance of being Financially Literate.
- Q. 3. Answer the following question in about 150-200 words. 10
- A) What do you understand by Financial Planning? Explain the different ways of building Financial Plan.
- OR
- B) Distinguish between Personal Finance and Financial Planning.
- Q. 4. Answer the following question in about 150-200 words. 10
- A) Explain in brief the meaning of Wealth Management. What is the scope of it?
- OR
- B) Explain in brief the components of Wealth Management.
- Q. 5. Answer the following question in about 150-200 words. 10
- A) Explain in detail the process of Wealth Management.
- OR
- B) Explain the importance of Wealth Management.

Q. 6. Answer the following question in about 150-200 words. 10

A) Explain in brief the tools used in Economic Environment Analysis.

OR

B) Explain in brief the factors affecting Economic Environment.

Q. 7. Answer the following questions in about 75-100 words. (Any Five) 20

A) Explain the advantages of preparing Financial Statement Analysis.

B) What are the uses of Financial Literacy Test?

C) Write a short note on Life Cycle Management.

D) What are the limitations of Wealth Management?

E) Write a note on ethics of Wealth Management.

F) Write a note on Key Indicators of Economic Environment Analysis.

