



Shiksha Mandal, Wardha'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) Explain the meaning & contents of personal financial statement in detail.
OR
B) What is the need to prepare a personal financial statement?
- Q. 2 Answer the following question in about 150 -200 words: 10
A) Explain the significance of financial literacy.
OR
B) Explain the features and advantages of financial literacy test?
- Q. 3 Answer the following question in about 150 -200 words: 10
A) Why there is a need for financial planning?
OR
B) Explain financial planning process.
- Q. 4 Answer the following question in about 150-200 words: 10
A) Explain the components of wealth management.
OR
B) Explain the scope of wealth management.
- Q. 5 Answer the following question in about 150-200 words: 10
A) Explain the process of wealth management.
OR
B) Why there is a need for wealth management?
- Q. 6 Answer the following question in about 150-200 words: 10
A) Explain the factors influencing yield curve & its significance.
OR
B) Explain the key indicators: Leading, Lagging & Concurrent.

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

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- a) What are the contents of position statement while preparing personal financial statement?
- b) Explain financial literacy test.
- c) Explain Financial Life Cycle.
- d) What is Wealth Management?
- e) Explain which ethics should be followed by wealth manager.
- f) Discuss Interest Rates & Real Return.

