

NATIONAL VOCATIONAL EDUCATIONAL QUALIFICATION FRAMEWORK (NVEQF)

SECTOR: ECONOMICS & FINANCE

SPECIALIZATION: FINANCIAL PLANNING: NVEQF/E&F/FP/LI

CERTIFICATE LEVEL- I

S.NO	VOCATIONAL CONTENT (DETAIL CONTENT AT L_All_Vocational_Ed_economics&finance)	HRS.	S.NO	GENERAL CONTENT	HRS.
1.	BASIC FINANCIAL SKILLS MONEY MATTERS : SMART GOALS AND FINANCIAL ANALYSIS BUDGETING : BALANCING THE MEANS AND THE ENDS INVESTMENT : NURTURING THE MONEY PLANT BASICS OF BANKING STALKING THE STOCKS INVESTMENTS : THE WIDER SPECTRUM BEYOND SAVINGS : BORROWING		1. 2.	SUBJECT OF STUDIES THE LANGUAGES WILL BE FROM THE FOLLOWING WITH THE FOLLOWING STRUCTURE (ANY TWO) HINDI, ENGLISH, ASSAMESE, BENGALI, GUJRATI, KANNADA, KASHMIRI, MARATHI, MALAYALAM, MANIPURI, ORIYA, PUNJABI, SINDHI, TAMIL, TELUGU, URDU, LEPCHA, LIMBU, BHUTIA, SANSKRIT, ARABIC, PERSIAN, FRENCH, GERMAN, PORTUGUESE, RUSSIAN, SPANISH, NEPALI, TIBETAN AND MIZO, TANGKHUL AND BODO. (DETAIL CONTENT AT L_1_Language) LANGUAGE I LANGUAGE II	140 140
2.	FINANCE BANKING SKILLS UNDERSTANDING BANK FEES ONLINE AND MOBILE BANKING DEBIT CARDS CREDIT CARDS CHEQUE PAN CARD-FAQS			MATHEMATICS (DETAIL CONTENT AT L_1_General_Ed)	140

	ATM AWARENESS				
3.				SCIENCE (DETAIL CONTENT AT L_1_General_Ed)	180
4.				SOCIAL SCIENCE (DETAIL CONTENT AT L_1_General_Ed)	180
	TOTAL VOC CONTENT	200		TOTAL GENERAL CONTENT	780
	GRAND TOTAL			980 HRS.	

SPECIALIZATION: FINANCIAL PLANNING:NVEQF/E&F/FP/LII

CERTIFICATE LEVEL- II

S.NO	VOCATIONAL CONTENT (DETAIL CONTENT AT L_All_Vocational_Ed_economics&finance)	HRS.	S.NO	GENERAL CONTENT	HRS.
1.	LOANS INTEREST RATE COLLATERAL SECURITY TYPES OF LOANS			SUBJECT OF STUDIES THE LANGUAGES WILL BE FROM THE FOLLOWING WITH THE FOLLOWING STRUCTURE (ANY TWO) HINDI, ENGLISH, ASSAMESE, BENGALI, GUJRATI, KANNADA, KASHMIRI, MARATHI, MALAYALAM, MANIPURI, ORIYA, PUNJABI, SINDHI, TAMIL, TELUGU, URDU, LEPCHA, LIMBU, BHUTIA, SANSKRIT, ARABIC, PERSIAN, FRENCH, GERMAN, PORTUGUESE, RUSSIAN, SPANISH, NEPALI, TIBETAN AND MIZO, TANGKHUL AND BODO. (DETAIL CONTENT AT L_2_Language)	140
			1.	LANGUAGE I	140
			2.	LANGUAGE II	
2.	DEPOSIT ACCOUNTS DEMAND DEPOSITS TERM DEPOSITS			MATHEMATICS (DETAIL CONTENT AT L_2_General_Ed)	140
3.	INSURANCE INSURANCE IS IMPORTANT TYPES OF INSURANCE INSURANCE AND MATURITY BENEFICIARY NOMINEE			SCIENCE (DETAIL CONTENT AT L_2_General_Ed)	180
4.	INVESTMENT			SOCIAL SCIENCE	180

	TYPES OF INVESTMENTS			(DETAIL CONTENT AT L_2_General_Ed)	
	MUTUAL FUNDS				
	INVESTOR AWARENESS SAFEGUARD				
	TOTAL VOC CONTENT	250		TOTAL GENERAL CONTENT	780
	GRAND TOTAL			1030 HRS.	

2.	<p>BUSINESS COMMUNICATIONS</p> <p>INTRODUCTION TO THE ESSENTIALS OF BUSINESS COMMUNICATION</p> <p>CITING REFERENCES</p> <p>USING BIBLIOGRAPHICAL & RESEARCH TOOLS</p> <p>WRITING A PROJECT REPORT</p> <p>WRITING REPORTS ON FIELD WORKNISITS TO INDUSTRIES, BUSINESS CONCERNS, ETC./BUSINESS NEGOTIATIONS</p> <p>SUMMARISING ANNUAL REPORT OF COMPANIES</p> <p>WRITING MINUTES OF MEETINGS</p> <p>E-CORRESPONDENCE</p> <p>SPOKEN ENGLISH FOR BUSINESS COMMUNICATION</p> <p>MAKING ORAL PRESENTATIONS</p>		<p>ANY THREE PAPERS OUT OF FOLLOWING (DETAIL CONTENT AT L_3_General_Ed_Commerce_Stream)</p>	
3.	<p>INSURANCE PLANNING</p> <p>LEGAL PRINCIPLES IN INSURANCE</p> <p>THE INSURANCE CONTRACT</p> <p>LEGAL LIABILITIES</p> <p>IDENTIFICATION OF LIFE, MEDICAL, HOUSEHOLDERS, AUTO, PROPERTY & LIABILITY RISK EXPOSURES</p> <p>PERSONAL PROPERTY AND LIABILITY INSURANCE</p>		<p>MATHEMATICS</p>	<p>150</p>

	LIFE INSURANCE NEEDS ANALYSIS LIFE INSURANCE POLICY ANALYSIS LIFE INSURANCE POLICY SELECTIONS ANNUITIES MEDICAL INSURANCE INSURANCE OF BUSINESS RISK IMPLEMENTING & REVIEWING CLIENT'S INSURANCE GOVERNMENT REGULATIONS OF INSURANCE INSURANCE PRICING INSURANCE COMPANIE				
4.				ECONOMICS	150
5.				BUSINESS STUDIES	150
6.				ACCOUNTANCY	150
7.				ENTREPRENEURSHIP	150
	TOTAL VOC CONTENT	350		TOTAL GENERAL CONTENT	690
	GRAND TOTAL			1040 HRS.	

SPECIALIZATION: FINANCIAL PLANNING:NVEQF/E&F/FP/LIV

CERTIFICATE LEVEL- IV

S.NO	VOCATIONAL CONTENT (DETAIL CONTENT AT L_All_Vocational_Ed_economics&finance)	HRS.	S.NO	GENERAL CONTENT	HRS.
1.	<p>BASICS OF RISK MANAGEMENT</p> <p>INTRODUCTION TO RISK RISK MANAGEMENT RISK IDENTIFICATION RISK EVALUATION RISK CONTROL RISK FINANCING - GENERAL RISK FINANCING - TRANSFER RISK FINANCING - RETENTION ALTERNATIVE RISK TRANSFER CORPORATE RISK MANAGEMENT CHANGING TRENDS IN RISK MANAGEMENT RISK MANAGEMENT AND SHAREHOLDER VALUE</p>		<p>1.</p> <p>2.</p>	<p>SUBJECT OF STUDIES I&II TWO LANGUAGES OUT OF FOLLOWING HINDI, ENGLISH, ASSAMESE, BENGALI, GUJRATI, KASHMIRI, KANNADA, MARATHI, MALLYALAM, MANIPURI, ORIYA, PUNJABI, SINDHI, TAMIL, TELUGU, URDU, SANSKRIT, ARABIC, PERSIAN, LIMBOO, LEPCHA, BHUTIA, MIZO, TANGKHUL, BODO, NEPALI, TIBETAN, FRENCH, GERMAN, PORTUGUESE, RUSSIAN AND SPANISH. (DETAIL CONTENT AT L_4_Language)</p> <p>LANGUAGE I</p> <p>LANGUAGE II</p>	<p>120</p> <p>120</p>
2.	<p>ANTI MONEY LAUNDERING</p> <p>WHAT IS MONEY LAUNDERING? PREVENTION OF MONEY LAUNDERING ACT (PMLA), 2002 RBI GUIDELINES INTRODUCTION TO ANTI MONEY LAUNDERING KNOW YOUR CUSTOMER CUSTOMER IDENTIFICATION PROCEDURE KYC AND RISK PROFILE OF THE CUSTOMER COVERED/EXEMPTED PRODUCT UNDER TGE PREVIEW OF AML REQUIREMENT SOURCES OF FUND SUSPICIOUS TRANSACTIONS</p>			<p>ANY THREE PAPERS OUT OF FOLLOWING (DETAIL CONTENT AT L_4_General_Ed_Commerce_Stream)</p>	

	RECORD KEEPING INTERNATIONAL INITIATIVE FOR ANTI MONEY LAUNDERING FINANCIAL ACTION TAX FORCE US PATRIOT ACT ASIA/PACIFIC GROUP OF MONEY LAUNDERING				
3.	KNOW YOUR CUSTOMER DEFINITION OF AGENT IRDA REGULATION 2000 ROLE OF AN AGENT CODE OF ETHICS COMPLIANCE RESPONSIBILITIES OF ASSOCIATES AND ADVISORS PROTECTION OF COMPANY ASSETS REPORTING TO ILLEGAL AND UNETHICAL BEHAVIOR			MATHEMATICS	150
4.				ECONOMICS	150
5.				BUSINESS STUDIES	150
6.				ACCOUNTANCY	150
7.				ENTREPRENEURSHIP	150
	TOTAL VOC CONTENT	350		TOTAL GENERAL CONTENT	690
	GRAND TOTAL			1040 HRS.	

SPECIALIZATION: FINANCIAL PLANNING:NVEQF/E&F/FP/LV

CERTIFICATE LEVEL- V

S.NO	VOCATIONAL CONTENT (DETAIL CONTENT AT L_All_Vocational_Ed_economics&finance)	HRS.	S.NO	GENERAL CONTENT	HRS.
1.	<p>RETIREMENT PLANNING</p> <p>ISSUES IN RETIREMENT PLANNING</p> <p>WEALTH CREATION</p> <p>TYPES OF RETIREMENT PLANS</p> <p>GROUP LIFE AND HEALTH INSURANCE</p> <p>RETIREMENT NEEDS ANALYSIS</p> <p>RETIREMENT INCOME STREAMS</p> <p>POST-RETIREMENT COUNSELING</p> <p>PENSION SECTOR REFORMS</p>		1.	<p>ANY THREE PAPERS OUT OF FOLLOWING</p> <p>(DETAIL CONTENT AT L_5_General_Ed_Commerce_Stream)</p>	
2.	<p>EMPLOYEE BENEFITS PLANNING</p> <p>DEFINED BENEFIT PLANS</p> <p>DEFINED CONTRIBUTION PLANS</p> <p>SUPERANNUATION AND OTHER</p>			BUSINESS ORGANIZATION AND MANAGEMENT	180

	RETIREMENT PLANS				
3.	MUTUAL FUNDS CONCEPT & ROLE OF A MUTUAL FUND FUND STRUCTURE & CONSTITUENTS LEGAL & REGULATORY ENVIRONMENT OFFER DOCUMENT FUND DISTRIBUTION & CHANNEL MANAGEMENT PRACTICES ACCOUNTING, VALUATION & TAXATION INVESTOR SERVICES RETURN, RISK & PERFORMANCE OF FUNDS SCHEME SELECTION SELECTING THE RIGHT			FINANCIAL ACCOUNTING	180

	INVESTMENT PRODUCTS FOR INVESTORS HELPING INVESTORS WITH FINANCIAL PLANNING RECOMMENDING MODEL PORTFOLIOS & FINANCIAL PLANS				
4.				MICRO ECONOMICS–I	180
5.				BUSINESS LAWS	180
				BUSINESS STATISTICS	180
				FUNDAMENTALS OF COMPUTERS AND INFORMATION SYSTEM	180
				MICRO ECONOMICS– II	180
				CORPORATE LAWS	180
	TOTAL VOC CONTENT	500		TOTAL GENERAL CONTENT	540
	GRAND TOTAL			1040 HRS.	

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CERTIFICATE LEVEL- VI

S.NO	VOCATIONAL CONTENT (DETAIL CONTENT AT L_All_Vocational_Ed_economics&finance)	HRS.	S.NO	GENERAL CONTENT	HRS.
1.	TAX PLANNING INTRODUCTION TO TAX PLANNING TAXATION TERMINOLOGY TAX CHARACTERISTICS OF BUSINESS FORMS RESIDENTIAL STATUS NON-RESIDENT INDIAN INCOME FROM SALARIES INCOME FROM HOUSE PROPERTY CAPITAL GAINS INCOME FROM OTHER SOURCES TAX PLANNING		1.	ANY TWO PAPERS OUT OF FOLLOWING (DETAIL CONTENT AT L_6_General_Ed_Commerce_Stream)	
2.	ESTATE PLANNING INTRODUCTION TO ESTATE PLANNING TRUSTS WILLS & SUCCESSION POWER OF ATTORNEY			BUSINESS MATHEMATICS	250
3.	FINANCIAL ADVISING			INCOME TAX LAW AND PRACTICE	250

	INTRODUCTION TO FINANCIAL ADVISING FINANCIAL PLANNING FINANCIAL INVESTMENT PRODUCTS TAXATION				
4.				MACRO ECONOMICS	250
5.				PRINCIPLES OF MARKETING	250
				MATHEMATICS	250
				INDIRECT TAX	250
				CORPORATE ACCOUNTING	250
				COST ACCOUNTING	250
				HUMAN RESOURCE MANAGEMENT	250
				INDIAN ECONOMY – PERFORMANCE AND POLICIES	250
	TOTAL VOC CONTENT	550		TOTAL GENERAL CONTENT	500
	GRAND TOTAL			1050 HRS.	

SPECIALIZATION: FINANCIAL PLANNING:NVEQF/E&F/FP/LVII

CERTIFICATE LEVEL- VII

S.NO	VOCATIONAL CONTENT (DETAIL CONTENT AT L_All_Vocational_Ed_economics&finance)	HRS.	S.NO	GENERAL CONTENT (DETAIL CONTENT AT L_7_General_Ed_Commerce_Stream)	HRS.
1.	<p>INVESTMENT PLANNING</p> <p>INTRODUCTION TO INVESTMENT PLANNING</p> <p>RETURN</p> <p>RISK</p> <p>TYPES OF RISK</p> <p>RETURN AND RISK</p> <p>QUANTIFYING EX-ANTE (EXPECTED RISK AND RETURN)</p> <p>RETURN AND RISK IN A PORTFOLIO CONTEXT</p> <p>THE MARKET MODEL</p> <p>USING BETA</p> <p>INTRODUCTION TO FINANCIAL MARKET</p> <p>EQUITY</p> <p>FIXED INCOME SECURITIES</p> <p>SMALL SAVING INSTRUMENTS</p> <p>MUTUAL FUNDS</p>		1.	<p>ANY ONE PAPER OUT OF FOLLOWING</p> <p>(DETAIL CONTENT AT L_7_General_Ed_Commerce_Stream)</p>	

	<p>FIXED DEPOSITS</p> <p>UNIT LINKED INSURANCE PRODUCTS</p> <p>DERIVATIVES</p> <p>REAL ESTATE</p> <p>OTHER INVESTMENTS</p> <p>INVESTMENT PROCESS</p> <p>ASSET ALLOCATION</p> <p>ACTIVE AND PASSIVE INVESTMENT STRATEGIES</p> <p>REBALANCING PORTFOLIOS REVISION OF PORTFOLIOS</p> <p>PORTFOLIOS REVISION TECHNIQUES</p> <p>REGULATORY FUNCTIONS OF FINANCIAL INSTITUTIONS</p> <p>COMPLAINTS HANDLING</p>				
2.	<p>SOFTWARE BASED FINANCIAL PLANNING</p> <p>UNDERSTANDING CLIENT RELATIONSHIP, FINANCIAL PLANNING'</p> <p>DATA GATHERING FROM CLIENT</p>			MANAGEMENT ACCOUNTING	300

	<p>INSURANCE PLANNING</p> <p>CASH FLOW ANALYSIS</p> <p>RISK PROFILING</p> <p>RETIREMENT PLANNING</p> <p>INVESTMENT PLANNING</p>				
3.	<p>BASICS OF FINANCIAL MARKETS</p> <p>INTRODUCTION TO FINANCIAL MARKET</p> <p>EQUITY</p> <p>FIXED INCOME SECURITIES</p> <p>SMALL SAVING INSTRUMENTS</p> <p>MUTUAL FUNDS</p> <p>FIXED DEPOSITS</p> <p>UNIT LINKED PLANS</p> <p>DERIVATIVES</p> <p>REAL ESTATE</p> <p>OTHER INVESTMENTS</p>			FINANCIAL MANAGEMENT	300

4.	FINANCIAL SERVICES ENVIRONMENT MONEYTARY AND FISCAL POLICY EXTERNAL FORCES ON INDIAN MAKETS COMPANY AS A BUSINESS MEDIUM, ITS STRUCTURE, AND ISSUES MONEY MARKET IN INDIA CAPITAL MARKET INSTRUMENTS REGULATORY BODIES			AUDITING	300
5.				E-COMMERCE	300
				FINANCIAL MARKETS, INSTITUTIONS AND FINANCIAL SERVICES	300
				COMPENSATION MANAGEMENT	300
				CORPORATE TAX PLANNING	300
				ADVERTISING AND PERSONAL SELLING	300
				BUSINESS DATA PROCESSING – I	
				INTERNATIONAL BUSINESS	
				GOVERNANCE, ETHICS AND SOCIAL RESPONSIBILITY OF BUSINESS	
	TOTAL VOC CONTENT	750		TOTAL GENERAL CONTENT	300

	GRAND TOTAL		1050 HRS.	
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