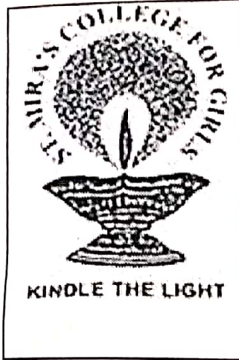


3.3.2



SADHU VASWANI MISSION'S  
St. Mira's College For Girls, Pune  
Autonomous (Affiliated to Savitribai Phule Pune University)  
Reaccredited by NAAC- A Grade, cycle 3  
[Arts, Commerce, Science, BSc (Computer Science), BBA, BBA(CA)]  
6, Koregaon Road, Pune-411001. [INDIA]  
Ph./Fax: 26124846; Email: [office@stmirascollegepune.edu.in](mailto:office@stmirascollegepune.edu.in)

PU/PN/AC/015/(1962)  
College Code:- 013

Circular No:G15/IQAC/2021-2022/134

Date:-28<sup>th</sup> January 2022

CIRCULAR

The Department of Business Economics and Banking is organizing a Workshop on "Mutual Funds and Personal Financial Planning" on 07-09<sup>th</sup> February 2022 for the TYBCOM students specializing in Banking and Finance from 03:30pm to 05:30pm. The students are requested to register for the same. Registration Link and other details will be shared on student group.

MSWagh  
Ms. Meenakshi Wagh  
Coordinator



Jayah  
Dr. Jaya Rajagopalan  
Principal In Charge  
St. Mira's College for Girls, Pune.

Due to the demise of smt. Lata Mangeshkar a holiday was declared on 07<sup>th</sup> February 2022 and the event scheduled from 07-09<sup>th</sup> February 2022 was postponed to 08-10<sup>th</sup> February 2022.  
MSWagh

Department of Business Economics and Banking

Report

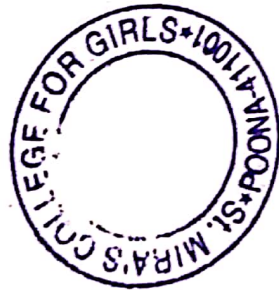
Workshop on – “Mutual Funds and Personal Financial Planning”

The Department of Business Economics and Banking organised a three-day workshop on “Mutual Funds and Personal Financial Planning” from 8-10<sup>th</sup> February, 2022 for the final year Commerce students specializing in Banking and Finance. It was conducted by Mr. Himanshu Mayne, CFPcm, Founder and CEO, Infinite Financial Academy and CFO Infinite Financial Planners.

The first session commenced with a rationale of the workshop, followed by a brief of the College, Department’s initiatives towards upskilling and enhancing employability of the students and a brief introduction of the speaker. The first session concentrated on the various concepts related to Mutual Funds like Schemes, NAV, SIPs, STPs, SWPs, Capital Gains Tax and important parameters to be considered while investing in Equity and Debt Funds with the help of a Fact Sheet.

The special feature of the second day session was a discussion on a real life financial plan on the basis of components like Budgeting; Debt Management; Investment Planning; Insurance Planning; Tax Planning and Retirement Planning, Ratios and significance of behavioural finance as well as the client’s financial goals, age, risk appetite, cash flows, Net Worth.

The final session emphasized upon the importance of Estate Planning and the distinct career options in financial markets at the national and international levels, including CFA and CFP. The session concluded by a student feedback of the workshop and a vote of thanks to the resource person.



*MSWagh*

Name and Signature of the Coordinator  
Dr. Meenakshi Wagh

*Jayak*  
Principal Incharge  
St. Mira's College for Girls, Pune.



St. Mira's College for Girls, Pune

(Autonomous-Affiliated to SavitribaiPhule Pune University)

Department of Business Economics and Banking

Workshop on "Mutual Funds and Personal Financial Planning" by CFPemHimanshuMayne

08-10<sup>th</sup> February 2022

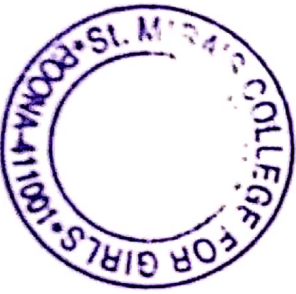
Participants List

Sr. No.	Names of Participants	Sr. No.	Names of Participants	Sr. No.	Names of Participants
1	PallaviHasandamani	17	Vanessa Noronha	33	Anita D. Choudhary
2	SmitaPatil	18	Anjali Baghel	24	KiranChoudhary
3	MadechaShaikh	19	PragatiJha	35	Anita J. Choudhary
4	MaseeraShaikh	20	Anita Tandale	36	DishakJinger
5	PurvaDhadwe	21	HarshadaShinde	37	AnushkaNikalje
6	SanchitaKadam	22	DivyaBairy	38	SharmeenSayed
7	Nikita Shinde	23	Shloka Panda	39	Alice Telore
8	ShreyaSuvarna	24	Sakshikolte	40	SaniyaMulla
9	SupriyaChaple	25	Himsarakunwar	41	AkshadaAngirwal
10	PremaAnand	26	SonalKhandelwal	42	GauriChavan
11	DevikaChawan	27	PriyankaBhure	43	SnehaSuman
12	ManshiChavai	28	PratikshaRaghu	44	Sachi Singh Baghel
13	Muskansadhvani	29	Sejal Thakur	45	NeelamKamble
14	RenukaManur	30	KajalYadav	46	KomalYadav
15	PranjalPatil	31	AryaGalande	47	ShashikalaAwaradhath
16	NeelamJhawar	32	SonalPawar		

*Jayshree*

Principal Incharge

St. Mira's College for Girls, Pune.



*MSUWagh*

Name and Signature of the Coordinator

Dr. MeenakshiWagh





Meenakshi Wagh

Meenakshi Wagh



4419\_neelam Jh...

4290\_Renuka M...

4204\_Smita Patil

4204\_Smita Patil



View

# BUDGET AND EMERGENCY FUND

Creating a Budget

Step 1: Identify the client's financial goals and determine what is required to reach them.

Step 2: Estimate income from all sources.

Step 3: Estimate expenses. These should be divided between fixed and variable.

Step 4: Compare income and expenses to determine if expected expenses are equal to greater than or less than expected income.

Step 5: If expenses are too high, identify potential sources of additional income or places where expenses may be reduced.

Step 6: Present each category of income and expense as a percentage of the total. This will make year-to-year comparisons easier. It may also lead to more efficient use of resources.

Participants (24)

Find a participant

- 4K 4518 Divya Kingor ✓
- 4M 4521 Anushka Nihalje ✓
- 4M 4526 Madhavi Markar ✓
- 4S 4528 Sharmeen Sayed ✓
- 4T 4530 Alina Thore ✓
- 4M 4535 Sanyal Mallika ✓
- 4G 4537 Tanni Ghorpade ✓
- 4S 4540 Akshada Arghwal ✓
- 4C 4547 Gauri Carvan ✓
- 4S 4554 Sachit Singh Baghel ✓
- 4Y 4563 Komal Yadav ✓
- 4N 4568 Ansh Madan ✓
- 4N 4570 Neelam Kamble ✓
- 4G 4576 Smita Surman ✓
- 4G 4576 Mansi Charav ✓
- 4G 4611 Anya Galande ✓

Invite

Unmute Me

Leave

54 Participants

Chat

Share Screen

Record

Reactions

29°C Sunny

16:15

09-02-2022

Urmute

Start Video

Type here to search

Hi

Share Screen

Record

Reactions

*Jaypat*

Principal Incharge

St. Mira's College for Girls, Puna.



*MSWagh*

*Ms. Meenakshi Wagh  
Coordinator*

Activity: Workshop on 'Mutual Funds and Personal Financial Planning'

Name: CFP Himanshu Mayne

Designation: A Graduation degree in Financial Markets, A Certified Financial Planner

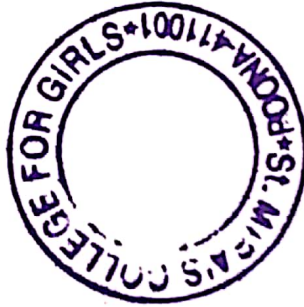
Place of Work: Mumbai, CEO of Infinite Financial Academy and Co-founder of Infinite Financial Planners

Address: Office No. 2, Meera Mohan CHS, Shreenagar, Wagle Estate, Thane - 400604

Email: him.mayne@gmail.com

Contact Details: 9819198758

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*Jayash*  
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