

Personal Tax Planning "Aaykar ko Apna Banaakar"

2 Days | Classroom Training | Delhi



21st & 22nd february 2025

Limited Seats!

In today's dynamic corporate landscape, the success of any organization hinges significantly on the competence and agility of its workforce.

Recognizing this imperative, we present the **3E EMPLOYEE SKILL+ Program, powered by #THREEE** that is a transformative into the realm of employee development, offering a cohesive and dynamic framework for nurturing talent, driving performance excellence, and fostering a culture of innovation and growth.

Enable Potential -> Equip Performance -> Empower Progress

These pillars, rooted in the realms of Behavioural, Technical, and Functional skills, form the cornerstone of the transformative learning journey.

Program Overview

Personal Tax Planning - *Aaykar ko Apna Banaakar*

- Training program designed to provide individuals with the knowledge and strategies to improve their tax planning.
- Provides participants with insights into the intricacies of taxation on various incomes, transactions, and residency statuses.

Additionally, attendees will gain an understanding of capital gains tax implications based on asset holding periods, types, and taxpayer statuses. Moreover, the program delves into tax planning strategies using financial products and basic estate planning concepts. Through interactive sessions and practical examples, participants will improve their awareness of finance, enabling them to make well-informed decisions regarding personal finance and tax matters.



Program Objective

By the end of the program, participants will be able to:

1

Understand the incidence of tax on various incomes, transactions, and residency status of individuals.

2

Evaluate the incidence of capital gains tax based on the period of holding an asset, the type of asset, and the taxpayer's status.

3

Recommend tax planning strategies using various financial products and assess their appropriateness in achieving client's financial goals.

4

Develop basic knowledge of estate planning.

Key Takeaways



Augment awareness in the domain of finance.



Assist in making better-informed finance-related decisions.

Ideal For

- ✓ Managers and employees involved in marketing and sales of financial services.
- ✓ Managers, who directly deal with clients at different levels, catering to their financial needs.
- ✓ Individuals managing their own finances and investments.

Methodology

An interactive Workshop which would be a blend of experience sharing, application through MS Excel, real life case scenarios and PowerPoint presentation.



Benefits

Gain insights into tax nuances in individual investments, improving personal finance decisions.

Trainers Profile



Neeraj Gupta

Neeraj is a strong finance professional with CFA (US), CFP, MBA Finance as academic qualifications, who became a passionate educator /corporate trainer /visiting faculty with a demonstrated history of building own blocks of association in the financial education industry.

He has an excellent track record in knowledge management with workshops delivered across different platforms on wide range of topics: Equity Analysis, Debt Market Analytics, Macro Economic Dynamics, Financial Reporting and Analysis, Corporate Finance, Fixed Income Securities in India, AIFs, Structured Products, Mutual Funds, Financial Planning Tax Planning, Risk and Estate Planning and Asset Allocation.

About NSE Academy Ltd

NSE Academy Ltd. is a wholly-owned subsidiary of the National Stock Exchange of India Ltd. (NSEIL).

NSE Academy enables the next generation of BFSI and FinTech professionals with industry-aligned skills through capacity-building programs and certification courses, powered by an online examination and certification system.

The courses are well-researched and carefully crafted with inputs from industry professionals. NSE Academy works closely with reputed universities and institutions across India in building a competent workforce for the future of BFSI and FinTech.

NSE Academy also promotes financial literacy as an essential life skill among youngsters - a contribution towards financial inclusion and wellbeing.



Program Fee: INR 35,000/- Plus GST applicable

Please contact NSE Academy for corporate pricing on bulk nominations

Contact for More Information

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