Reg.No. \_\_\_\_\_\_\_\_\_\_\_\_



**UNIVERSITY**

(Karunya Institute of Technology & Sciences)

(Declared as Deemed-to-be University under Sec.3 of the UGC Act, 1956)

**Supplementary Examination – June – 2017**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| **Code :** | **15MS3010** | **Duration :** | **3hrs** |
| **Sub. Name :** | **WEALTH MANAGEMENT** | **Max. marks :** | **100** |

**ANSWER ALL QUESTIONS (5 x 20 = 100 Marks)**

|  |  |  |  |
| --- | --- | --- | --- |
| Q. No. |  | Questions | Marks |
| 1. |  | Explain various types of players in wealth management industry. | 20 |
| (OR) | | | |
| 2. |  | Discuss the global wealth management market. | 20 |
| 3. |  | Describe the role of an executive in a wealth management firm. | 20 |
| (OR) | | | |
| 4. |  | Explain various investment products available in India. | 20 |
| 5. |  | Explain the client behavior in wealth management. | 20 |
| (OR) | | | |
| 6. |  | Discuss the difference between an asset management firm and an investment firm. | 20 |
| 7. |  | Explain various services that can be provided to HNI (High Networth. Individual) clients by wealth management firm. | 20 |
| (OR) | | | |
| 8. |  | Discuss the future trends in wealth management industry. | 20 |
|  | | **Compulsory:** |  |
| 9. |  | Name: Mr.John (68 years) Spouse:  Mrs.Ann (64 years)  Present assets:  Cash in bank – Rs.12 lakh,  Fixed Deposit – Rs.30 lakh,  Own house – Rs.90 lakh  Post office schemes – Rs.4 lakh,  Plot of land in Coimbatore – Rs.25 lakh,  Equity Shares – Rs.12 lakh,  Equity mutual funds – Rs.2 lakh,  The couple is looking to use their existing holdings to have a comfortable retired life. Their lifestyle expense is Rs.35, 000 per month. They are evaluating the option of spending on 3 foreign vacations in the next 5 years each costing Rs.3 lakh. They are also keen on giving their wealth to their two granddaughters in equal share. Give your suggestions for the couples for their retirement planning and portfolio building. | 20 |

ALL THE BEST