

**Management Development Program**  
**on**  
**'Personal & Financial Well Being'**

**July 25-26, 2019**



**Program Directors:**

**Prof. Mamta Mohapatra**  
**Prof. Aman Srivastava**



**International Management Institute**  
**New Delhi**

## **INTRODUCTION**

Changing life styles, rising uncertainties and a complex environment poses a myriad of challenges for organizations in general and for employees in particular especially in managing personal finance and wellness of self and family. This Program focuses on ways of achieving long-term happiness and financial wellness of individuals by highlighting means of balancing work with family responsibilities, enriching relationship, reducing stress and enhancing time management skills, personal financial planning and managing risk. The program has two sets of objectives, first objective deals with financial aspects of one's life and focuses on the issue that 'one can't stop rain but can carry umbrella'. The second objective deals with work-life balance, relationship management, time management and stress/anxiety management.

## **OBJECTIVES**

After attending this program, the participants should be able to:

- comprehend life cycle financial wellness and financial planning
- understand Indian capital markets
- manage financial impact of certain and uncertain events of life and contingencies
- use better judgement while selecting tax friendly investments and insurance products
- reduce stress and burnout for better productivity
- be in greater control of themselves for personal growth
- increase concentration power and energy levels
- rejuvenate body, mind and soul
- increase overall sense of well being
- acquire and/or sharpen such skills and competencies as are desirable for maintaining healthy work-life balance

## **COVERAGE**

### **Life cycle, financial wellness and Financial Planning**

Life cycle of an individual and financial needs, phases of life and financial needs, Causes of financial distress, balancing consumption and saving, financial planning for certain and uncertain events of life, philosophy of asset allocation

### **Understanding Financial Statements**

Basics of profit & loss account, balance sheet and ratio analysis from investor's perspectives. How value is created and measured by companies? Understanding and analyzing financial statements and ratios for individuals.

### **Personal Investment Planning and Capital Markets (Goal based investment)**

Time value of money, power of compounding, risk return trade off, understanding capital markets cash and savings management, managing liabilities, creating personal budgets, Asset allocation and diversification, goal-based investment, equity vs non-equity investment, concept of financial derivatives, personal tax issues in investment

### **Personal Insurance Planning (Managing contingencies of life)**

How to select appropriate insurance company & products: need for insurance, principals of insurance, estimating life insurance requirements, term policy vs. endowment policy, unit linked plans, riders, do's and don'ts in buying insurance, personal tax issues in insurance

### **Self - Management Strategies**

Developing Attitude of Sharing, Enabling and Caring by practicing coping mechanisms to overcome stress as well as strengthening Stress Management Competencies. Balancing Work pressures and family demands.

### **Managing Emotions for Positive Thinking**

Increasing awareness about our emotions and understanding how emotions can influence thoughts, behavior, goals, decision-making, and work / personal relationships and building emotional resilience for high performance.

### **Managing Professional Relationships**

Developing shared vision and goal congruence acquire and sharpen such behavioral skills and attitudes as are desirable for positive thinking, effective inter personal relationship and working in harmony

### **Managing Time and Task**

Tips for exercising conscious control over the amount of time spent on specific activities, especially to increase effectiveness, efficiency and productivity.

## **FACULTY AND RESOURCE PERSONS**

IMI faculty members and eminent resource persons will share expertise and experience in various sessions

### **PROGRAM DIRECTORS**

**Prof. Mamta Mohapatra** is Doctorate, Masters in Personnel Management & Industrial Relations, Law Degree from Utkal University and FDP from IIM, Ahmedabad, Dr. Mohapatra has over twenty years of experience in teaching, research and training activities in the areas of Human Resource Management, Industrial Relations and Organization Behavior. Currently, she is Professor in the OBHR area and Chair MDP and Executive Education at International Management Institute, New Delhi.

Her prior assignments include Manager in Gregg's of Enfield, London, and Fellow, Institute for Integrated Learning in Management, New Delhi. She has been involved in training and consultancy activities with a number of public as well as private sector organizations including Bharti Telecom Ltd., Cyber Media India Ltd., Triune Projects Ltd., NTPC, Numaligarh Refinery, Pepsi Foods Ltd., DVVNL, Everest Industries Ltd., Delhi International Airport Pvt. Ltd., MMTC, NSPCL, EIL Tata Power, NHPC, Tata Communications, Vodafone, Dena Bank, Indian Overseas Bank, IFFCO, Allahabad Bank, Neyveli Lignite, Canara Bank, REC, IOCL, ONGC, IndusInd Bank amongst others.

She is a certified HR Competency Assessor. She has acquired expertise and training skills from Harvard Business School on Participant Centered Learning with special focus on teaching through case method. She has to her credit a number of published research articles in reputed journals and four books in the area of Performance Management, Leadership, Capability Building and General Management. She has presented papers and chaired sessions in national and international conferences and is reviewer of papers for national and international journals. She is Associate Editor of the International Journal- Global Business Review. In recognition of her contribution to the field she has received the Lokmat National Education Leadership Award as 'Best

Professor in Human Resources' in Feb 2014, Bharat Vikash Award in 2016 and Best HR Faculty Award by NIPM in April 2018.

Her professional interests include Applied and Action Research in, Cross-cultural Management, Talent Management, Strategic Human Resource Management, Diversity Management, Organization Restructuring and Management of Change.

**Prof. Aman Srivastava**, Professor (Finance) at IMI, has more than twenty years of experience in research, teaching and corporate training. He has trained Government officers and corporate executives of more than 50 countries. He has conducted training programs for executives of ONGC, Oil India, Indian Oil, HPCL, GAIL, NLC, NTPC, NHPC, SJVN, Coal India, SAIL, NALCO, MCX, RAIL Tel Corporation, HUDCO, MSME, TCIL, AC-Nelson, Greenfield.com, Standard Chartered Bank, NAFED and much more. He has published research papers and cases in national and international journals including Theoretical Economics Letters (TEL), International Journal of Theoretical & Applied Finance (IJTAF), Asian Economic Review, Global Business Review, Asia Pacific Business Review, Decision and much more. His areas of specialization are corporate finance, risk management, mergers & acquisition and investment & wealth management. He has participated in training programs of Harvard Business School, Richard Ivey School of Business and AACSB International, USA. He was awarded for his cases and research papers by Strategic Management Forum at IIT Mumbai and IIT Kanpur.

#### **ADMINISTRATIVE DETAILS**

**Dates:**

**July 25-26, 2019**

**Venue:**

International Management Institute  
B-10, Qutub Institutional Area  
New Delhi 110016

#### **FEE**

**Non-residential:** Rs. 18,000/- per participant (plus @18% GST) covering professional fee, program kit and tea/lunch.

**Residential:** Rs. 25,000/- per participant (plus @ 18% GST) covering professional fee, program kit and boarding and lodging (air-conditioned single room) at IMI Campus, New Delhi from noon of **July 24, 2019 till noon of July 27, 2019.**

#### **Group Discounts**

- 10% discount on fee amount is available in case an organization nominates 2 or more participants to the program.
- 20% discount on fee amount is available in case an organization nominates 4 or more participants to the program.

Fee is payable in advance by way of local cheque/DD in favor of "**International Management Institute**" payable at New Delhi or through direct electronic fund transfer to IMI Bank Account, as per following details:

Allahabad Bank Account Number: 50084979288  
MICR Code: 110010007, IFSC Code: ALLA0211083  
Pan No. AAAT10972K; GST No. AAAT10972KIZJ

Please mention the program name while making payment through electronic fund transfer.

## **REGISTRATION**

The registration form duly filled in along with the program fee should reach us at least 7 days before the commencement date of the program. **In case of subsequent withdrawal or cancellation of registration no refund of fee will be allowed.** However, substitute(s) may be permitted with prior intimation.

## **CERTIFICATE OF PARTICIPATION**

A certificate of successful participation by International Management Institute (IMI) will be issued to each delegate at the culmination of the program.

## **ABOUT IMI**

International Management Institute (IMI) is India's first corporate sponsored Business School founded in 1981 with the original campus in New Delhi. The corporate sponsors included RPG Enterprises (lead sponsor), ITC, Nestle, Tata Chemicals, British Oxygen, SAIL, and Williamson Magor. It was set up in collaboration with the then IMI Geneva, now IMD Lausanne. Subsequently two other campuses were set up in Kolkata (2010) and Bhubaneswar (2011). In the last several years, IMI New Delhi has been consistently ranked in the top 10-15 Business Schools in the country and among the top 5 private Business Schools. It is accredited by the UK based Association of MBAs (AMBA), one of the top three international accreditation bodies for Business Schools globally.

IMI New Delhi has global linkages with leading schools in Europe, North America, and Asia. The Institute currently offers the PGDM, PGDM-HRM, PGDM-Banking & Financial Services, Executive PGDM and FPM (doctoral program). In addition, it has built a vibrant Executive Education vertical offering training to management professionals from the corporate world. The Institute has been empaneled by the Government of India to train participants from developing countries under the International Technical & Economic Corporation (ITEC) program of the Ministry of External Affairs.

IMI New Delhi puts a strong focus on high quality research by its faculty leading to publications in international peer reviewed academic journals. Its faculty have PhDs from top international and national universities/institutes, with many of them also having significant corporate experience.

***For registration/any other information, please contact:***

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