Training Structure

Phase 1: Basic Financial Services Knowledge (2 Months)

This phase will focus on introducing the recruits to the fundamentals of financial services, including but not limited to:

- **Introduction to Financial Markets**
  Overview of stock markets, mutual funds, debt markets, insurance, etc.
- **Financial Products and Services**
  Detailed understanding of mutual funds, insurance products, retirement plans, investment strategies.
- **Regulatory Environment**
  Overview of financial regulations and guidelines from SEBI, IRDAI, AMFI, and RBI.
- **Role of a Financial Advisor/Distributor**
  Understanding of advisory services, client interaction, and compliance.
- **EQUITY MARKET / PRIMARY & SECONDARY MARKET / FUNDAMENTAL & TECHNICLA ANALYSIS / ASSET CLASSES / SUB CLASSES / ASSET ALLOCATION / HUMAN LIFE CYCLE**
- INTRODUCTION OF DERIVATIVES MARKET / OPTIONS / WEALTH MANAGEMENT / PMS / AIF / COMMODITY / CURRENCY / GLOBAL LANDSCAPE STRATEGY / PORTFOLIO DESINGING ETC.

Outcome: By the end of this phase, participants will have a sound understanding of the basic concepts and operations in the financial services industry, including they would be able to complete their certification course as well in mutual fund V exam.

Phase 2: Professional Grooming & Personality Development (1 Month)

This phase aims to develop soft skills, refine personal and professional grooming, and build confidence in handling client-facing roles.

- **Communication Skills**
  Training on verbal and non-verbal communication, active listening, and building rapport with clients.
- **Professional Etiquette**
  Grooming tips, corporate dressing, meeting etiquette, and handling professional correspondence.
- **Public Speaking & Presentation Skills**
  Enhancing the ability to speak confidently in public, deliver presentations, and persuade clients.
- **Time Management & Stress Handling**
  Time management strategies, prioritization, and techniques for managing work-related stress.

- **Questions handling, Sales and Marketing, Mind set Building, Making the Business Plan and Execution of the Planning.**
- **Introduction of digital marketing**
- **PRESENATATION SKILL etc.**

Outcome: By the end of this phase, participants will have developed a professional demeanour and essential communication skills, along with a polished personal appearance.

Phase 3: Market Application & Employability Skills (4th Month)

The final phase will focus on putting the acquired skills into practice, ensuring that recruits are employable and capable of thriving in the marketplace.

- **Client Interaction & Relationship Management**
  Practical training in client handling, understanding client needs, and providing customized financial solutions.
- **Sales & Negotiation Skills**
  Techniques to sell financial products, handle objections, and negotiate effectively with clients.
- **Mock Client Meetings & Role Plays**
  Role-playing exercises to simulate real-world client scenarios.
- **Final Assessment & Feedback**
  Assessment of skills gained through written tests, presentations, and mock client meetings, followed by detailed feedback for further improvement.

Outcome: By the end of this phase, participants will be able to confidently engage with clients, offer professional advice, and perform successfully in their roles.