

Innovative Teaching Pedagogy-SAR

Risk Profiling of Investors

Faculty Name: Dr. Manita D Shah

Course Title: Wealth Management

Year and Semester: 2021 - Semester 3

Objective: To design effective client management strategies aligned to a clients' profile

Group/ Individual: Group Assignment

Overview: Each student was required to undertake client profiling based on their demography wherein they were required to interview and discuss the risk taking ability, evaluate individuals' financial strengths and weaknesses. Finally, they were required to suggest corrective measures accordingly.