

Workshop on Portfolio Construction in Wealth Management

CMS Business School organized a workshop on Portfolio Construction in Wealth Management on September, 9, 2016. The keynote speaker for the event was Ms. Dhvani Shah, Director of Flip Coin Investments. The workshop was a blend of academics and best industry practices related to wealth management which helped the participants in understanding the wealth concepts, asset classes, investments risk and returns, stock portfolio creation, etc. The session involved videos and case studies which made concepts easy, interactive and dynamic.

The Financial system acts as the most significant reflection of an economy. Wealth Management has developed into one of the most respected and highly compensated occupation in the financial services industry. Globally, the financial advisers have emerged as the most recent class of experts who either as entrepreneurs or as working professionals in banks or other investment advisory firms create financial plans for their clients and also help them to accomplish their financial goals.

