

Section B (40 Marks)

- Q.2. (Answer Any One)
- What is wealth management?
 - What is the role of equity in wealth management?
 - Explain working life stages of an individual and financial needs at each stage.
- Q.3. (Answer Any One)
- What are Insurance Linked Annuities?
 - What is Accident Insurance / Personal Accident Insurance?
 - Explain taxation aspects of various Life and health insurance policies
- Q.4. (Answer Any One)
- What factors affect retirement planning?
 - What is the national pension scheme (NPS)?
 - What is longevity risk? How does it affect retirement planning?
- Q.5. (Answer Any One)
- Explain purpose and need of estate planning.
 - Define will. Explain characteristics of will.
 - What is family trust? How do family trusts work?

+++++++ **Best of Luck** ++++++