

Section B (40 Marks)

Medical Exam July
2022

- Q.2. (Answer Any One)
- What is wealth management?
 - What is the role of debt in wealth management?
 - What is the financial planning process?
- Q.3. (Answer Any One)
- What is Endowment Life Insurance?
 - What is Group Health Insurance Policy?
 - What is 'Liability Insurance'? Explain Different types of Liability Insurance
- Q.4. (Answer Any One)
- What factors affect retirement planning?
 - Write a note: Voluntary retirement scheme (VRS)
 - Explain role of wealth planner in retirement planning.
- Q.5. (Answer Any One)
- Explain purpose and need of estate planning.
 - Distinguish between: Will v/s power of attorney
 - How does the probate process work?

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