



P. V. Subramanyam

Author | Trainer | Commentator | Blogger | Advisor

Subra, as he is popularly known, is a CA by qualification and a past member of the National Stock Exchange. He teaches finance to non-finance managers and personal financial planning. Employees and associates of Banks, life insurance companies, mutual funds, corporate and brokerage houses have benefitted from his learning programs. He has also authored a book '**RETIRE RICH INVEST RS. 40 A DAY**' and writes a blog www.subramoney.com



WORKSHOP CONTENT

- Understanding Human Life Value
- Goal Setting – Where do I want to go?
- Situational Analysis – Where do I stand today?
- Math for investing – How far do I have to go?
- What are the options available for investing?
- Understanding the basics of financial markets
- What to look for in an agent
- Retirement planning
- Legacy planning - Making the exit easier for all

'Suppose if you were on a long road trip, you'd stop occasionally and look at the map to see if you were headed in the right direction, wouldn't you? A financial checkup serves the same purpose. It's an opportunity to review how you've done financially over the past years and make sure you're still headed in the right direction. Training on 'Personal Financial Planning' will provide you tips and worksheets for setting financial goals, managing credit and debt, building your assets, and limiting your financial liabilities. It will also help you evaluate changes in your financial situation, review your investment strategies and will equip you with most appropriate and usable tools to take the right investment decision fulfilling your personal needs, dreams and goals. The workshop will also help you to take the initial steps in choosing a suitable investment strategy based on your present life situation. If you are young married with children it will guide you plan for your children's education, consumer finance and housing. If you are married with older children it will help you plan for your retirement and insurance needs. It will guide you to device an investment strategy best suited to your circumstances, financial status, resources, assets, liabilities, attitudes, life style and needs. This workshop will change your life. It will be a valuable tool for you in developing your thoughts and ideas. It will allow you to formulate a workable game plan for your family and you,' says Subra

Finance and Accounting for Non-financial Managers

Ensure your non-financial managers know practical concepts and skills in order to make better management decisions



'It is important for businessmen and managers from all streams to understand the financial implications of their decision making. Salesmen have to know why collection is important and CEOs have to understand how to apply Balance Sheet ratios while talking to other Board members. The aim of this workshop is to provide non-finance functional managers with awareness and basic understanding of the way finance affects their business objectives. This course is designed for managers and those professionals who are responsible for financial matters- which means all of the managers! It will help managers understand the financial implications of their decisions. During the workshop the participants will learn to read the accounts, understand the terminology, be able to influence and control the key financial measurements, understand financial jargon, targets – all from an operational management perspective. The programme enables them to gain confidence in developing financial negotiations, participate in meetings where the finances are being discussed. It will help managers play a more active role in personal finances and the financial aspects of the organisation,' says Subra

WORKSHOP CONTENT

- Understanding the financial system and environment
- Appreciating investment better
- Introduction to P&L, balance sheets, cash flows
- Responsibility accounting & budgets
- How interest rates work
- Financial implications for decision making
- Need for financial statements
- Profit & loss account
- Balance sheet
- Cash flow statement
- Ratio analysis
- Time value of money
- Risk return perspective
- Sources of funds – debt & equity
- Understanding various financial instruments
- Mergers & acquisitions
- Introduction to valuation
- Working capital management