



## PTVA's Institute of Management

(Approved by AICTE, DTE and affiliated to University of Mumbai)  
Chitrakar Ketkar Marg, Behind M. L. Dahanukar College of Commerce,  
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ISO 9001:2015 Certified Institute & Accredited by NAAC

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**Session Topic:** Financial Freedom

**Session Date:** 12<sup>th</sup> August 2023

**Session Timing:** 11 am to 1 pm

### **Objective:**

To provide a good understanding of financial independence and be able to create a strong financial foundation.

### **Brief about the session:**

The session was conducted for first year MMS students as well as teaching and non-teaching staff. Ms. Forum Kapadia, Co-founder and Director of Kapadia Wealth Builders was the speaker for the session, having experience of more than 10 years as a financial advisor. The speaker was accompanied by Mr. Ganesh Sangle, who is having more than 20 years of experience in wealth management industry.

The speaker introduced the session by making the attendees understand the importance of being financially independent. The session covered discussions of setting clear financial goals and how they contribute to achieving freedom. An insight was given on exploring different savings and investment strategies to grow wealth over time. The speaker shared useful insights regarding systematic investment plan (SIP) and about her expertise in mutual funds, IPOs/shares/bonds, retirement planning, tax planning, real estate.

The session was interactive, and the attendees got an opportunity to clear their doubts on financial planning. By implementing various strategies discussed in the session, attendees can navigate their financial paths with confidence and work towards a future marked by freedom, security and opportunities.



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