



RBG HR SERVICES LLP

RBG HR Services presents **RBG BSFI** training program for young entry level professionals at ZERO COST, in line with ...

IDEA behind RBG HR Services

We believe that there is no shortage of talent or quality jobs. All what is needed is a platform where they can find each other

Our Vision

RBG is committed to bringing the best hiring experience for corporates that will change hiring market place in the future

Our Mission

Our mission is to unlock the potential of Indian Talent and improve the quality of Life in India

BSFI

“BSFI usually comprises commercial banks, insurance companies, non-**banking** financial companies, cooperatives, pension’s funds, mutual funds and other smaller financial entities. **Banking** may include core **banking, retail**, private, corporate, investment, cards and the like “

We strongly believe any Graduate with 2 years plus, experience in sales and marketing in any field, after completing “RBG BSFI” training module can be placed by us in TOP Multinational BSFI Company in a Pay scale ranging from Rs.2.25 Lakhs to 3 Lakhs per Annum

BSFI Overview

- Companies in BSFI Sector,
- Products and Services offered by each constituents like Bank, NBFC's, Insurance companies etc.
- Distribution module,
- Regulators and Its role,
- Career opportunities.

Basics of Financial market

- What is Investment?
- What care should one take while investing?
- What is meant by Interest?
- What factors determine interest rates?
- What are various options available for investment?
- What are the Short-term and Long-term options available for investment?
- What is meant by a Stock Exchange?
- What is an 'Equity'/Share?
- What is a 'Debt Instrument'?
- What is a Derivative?
- What is a Mutual Fund?
- What is an Index?
- What is a Depository?
- What is Dematerialization?
- What is the function of Securities Market?
- What is the role of the 'Primary Market'?
- What is meant by Secondary market?
- What precautions plus do's and Don'ts should an investor bear in mind when investing in the stock markets?

Financial Markets – Overview

- Basic roles of the financial market,
- Why and how are financial markets different from other markets?
- Role of different financial systems:
 - Bank based financial systems
 - Capital Market based financial systems
- Role and contribution of different segments in India's Financial Market:
 - The Equity Market
 - Derivatives Market
 - The Debt Market

Regulatory Institutions in India

- Role of regulatory institutions
 - The Reserve Bank of India (RBI)
 - The Securities and Exchange Board of India (SEBI)
 - Insurance Regulatory and Development Authority (IRDA)
 - Pension Fund Regulatory and Development Authority (PFRDA)
 - Forward Markets Commission (FMC)

Operational aspects of financial transactions

- KYC and AML Guidelines

Life insurance

- Introduction to Insurance
- What Life Insurance Involves
- Legal Principles of Life Insurance
- Financial Planning
- Life Insurance Products
- Application of Life insurance
- Life Insurance Agency as a Career
- Life Insurance Selling Process
- Regulatory Aspects

General Insurance

- Introduction to General Insurance
- Principles of General Insurance
- Marketing and Selling Insurance
- Legal and Regulatory Aspects
- Personal and Retail Insurance
- Commercial Insurance
- Insurance Career Prospects

Health Insurance

- Introduction to Health Insurance
- Health Insurance Products
- Health Insurance Underwriting
- Health Insurance Claims

Mutual Funds

- Concept and Role of a mutual fund
- Advantages and limitations of mutual fund
- Different types of funds
- Investment Objectives
- Close ended funds and open ended funds
- Categorization of funds by investment objective/investing horizon and asset class
- Legal and Regulatory Environment:
 - Role of the regulators in Mutual Fund Industry ,
 - The salient features of the AMFI Code of Ethics and AMFI Guidelines & Norms for Intermediaries (AGNI)
 - Investor rights and obligations
- Distribution and Sales Practice:
 - Distribution channels for mutual funds
 - Pre-requisites for becoming a mutual fund distributor
- Mutual Fund Products:
 - Product features of diversified equity schemes, fixed maturity plans and index schemes
 - Fact sheet and their uses
 - Selecting the Right Investment products for Investors

Pension in India

- Definition of Pension
- Evolution in India
- NPS

Banking and NBFC's

- Introduction
- Banking & NBFC Structure in India
 - Role of RBI & SEBI
- Bank Deposit Accounts
 - Introduction to Bank Deposits
 - Types of Deposit Accounts
 - Strategies of mobilizing deposits
 - Deposit Insurance
- Basics of Bank Lending
 - Principles of Lending and Loan Policy,
 - Basics of Loan Appraisal
 - Credit decision-making and Review
 - Types of Advances

Securities Market in India

- Primary Market
- Secondary Market
- Role and functions of Securities and Exchange Board of India (SEBI)

Financial planning

- Introduction to Financial Planning
- Why Financial Planning is needed
- Financial Planning Process
- Financial Planning facts
- Expectations from Financial Advisors and Clients
- Insurance, Retirement, Tax, Estate & Succession Planning

Role and responsibilities of Manager

- Distribution Management (Agents, Brokers, Corporate Agents, Business partners)
- Prospecting techniques (My 100, referrals, Center of influence)
- Selling Skills
- Customer Behavior understanding & management
- Role play and field Activity

Work shop

- Communication skills
- Dressing skills
- Corporate & General etiquette
- Basic of MS office and presentation skills
- Mail writing skills, Internet and its usage