

MANAGEMENT DEVELOPMENT PROGRAMME

Harnessing Artificial Intelligence in Personal Finance and Wealth Creation



Overview

Managing personal wealth and making informed investment decisions have become essential life skills for professionals. This two-day online program provides a structured approach to building a solid foundation in personal finance while equipping participants with investment management strategies tailored to their financial goals. Delivered through a mix of conceptual inputs and applied tools, this programme helps individuals take control of their finances, optimize their savings, and design goal-linked investment portfolios.

Key Topics Covered

Day 1: Financial Awareness & Foundation

- Understanding your financial life and setting goals
- Risk profiling and insurance planning
- Introduction to time value of money and basic return metrics
- Overview of financial instruments

Who Can Attend?

This programme is designed for:

- Working professionals seeking structured guidance on managing their finances
- First-time investors or those looking to systematize their investment approach
- Mid to senior-level executives aiming to build long-term wealth aligned with life goals
- Entrepreneurs and independent professionals seeking financial security & investment discipline

No prior background in finance or investing is required.

Day 2:

- Decoding basic AI-ML-GAI
- AI-Powered Investing: Smarter Portfolios for the Everyday Investor
 - Portfolio optimisation using machine learning – diversification, risk profiling, rebalancing.
 - Predictive analytics for stock and mutual fund screening.
- Decode Market Signals with GPT

Dr. Avinash Ghalke

Programme Director

Associate Professor,
Finance and Economics

Mode of Delivery:

On Campus - Mumbai

Duration:

2 Days

Programme Dates:

13th & 14th March 2026

Programme Fees:

INR 25,000+GST

**10% Early Bird Discount and
Group Discounts Available**

Objectives



Enable participants to assess and improve their personal financial health



Equip participants with goal-based investment planning techniques



Familiarize individuals with principles of asset allocation, diversification, and portfolio review



Empower participants to build a practical, personalized investment blueprint

Pedagogy

- ✓ Live interactive sessions with faculty
- ✓ Real-world illustrations & personal finance tools
- ✓ Hands-on exercises using Excel Templates and worksheets to develop a personal financial roadmap

Certificate of Participation

A certificate of successful participation by S.P. Jain Institute of Management and Research (SPJIMR) will be issued to each delegate at the completion of the programme.



Connect with Us

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