



Association of Medical Consultants, Mumbai along with Finnovate

Presents

Wealth Rx: Financial Planning & Investment Strategies for Doctors

Seven-Module Masterclass



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Register Now

An AMC Mumbai initiative
powered by **Finnovate**

Course Overview

This live, interactive course is designed for busy health care professionals who want a clear step-by-step path to financial fitness. Backed by 20+ years of experience working with doctor families and officially accredited by AMC, you'll save hours of scattered research and avoid costly mistakes. This course does not provide any tips on chasing multibaggers or how to get quick-rich. Just pure, unbiased advice on building a discipline approach towards managing your money. No nudge to trade. Get in the right mindset with the right habits and practices that will help you achieve your financial goals - **Safely, Surely and Swiftly.**

Course Schedule

Time: 09:30 AM – 01:30 PM (IST) on alternate Sundays

Mode: Live Zoom sessions + quick quiz at end of each module

Session	Date	Topic
Module 1	22 June 2025	All About Financial Planning For Achieving Your Goals
Module 2	06 July 2025	How To Grow Your Practice While Saving Taxes
Module 3	20 July 2025	Overview Of All Asset Classes and Basics Of Investing in Mutual Funds
Module 4	03 Aug 2025	Basics Of Investing In Mutual Funds (continued)
Module 5	17 Aug 2025	Basics of Fundamental & Technical Analysis of Stocks
Module 6	31 Aug 2025	Loans, Insurance, Legacy: Managing Risk & Wealth Transfer
Module 7	14 Sept 2025	Instilling The Right Financial Habits - Recap Of The Course

Who Should Attend

- Medical Professionals and their immediate Family Members.
- Clinic owners and medical entrepreneurs
- Resident Medical Practitioners (RMP)

What You Will Learn

- Learn the art of Financial planning.
- Build habits, discipline and structure in your financial life.
- View personal finance as a purpose-driven process, not ad-hoc decisions.
- Create a clear roadmap to early financial freedom.
- Make informed choices steer clear of unsuitable products.
- Implement and monitor an asset allocation plan that fits your goals.
- Protect against risks with the right insurance cover.
- Manage loans and plan a smooth transfer of wealth to your heirs.

Program Highlights

- **Compact** and crisp content to prepare and reinforce learning.
 - **Self-Assessment Quizzes:** Gauge progress after each module.
 - **Peer-to-Peer Forum:** Exclusive community access for doubt-clearing & networking
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Team of Trainers



Nehal Mota

- Co-Founder & Director, Finnovate (SEBI-registered Investment Adviser)
- 20+ years in financial services; 500+ workshops/webinars delivered
- Guided 35,000+ professionals in disciplined money management.



Naveen Singh

- Co-founder & Director at Finnovate, Financial Planning & Technology Expert
- 20+ years of experience in analytics, technology, & financial markets
- Expertise in financial innovation, portfolio management, investment strategies, & AI-based platforms.



Sagar Maheshwari

- Certified Financial Planner, MBA Finance.
- Trained over 5,000 professionals in financial planning.
- 10 years of experience in wealth management & financial advising.



Chintan Dudhela

- Financial Fitness Expert with experience in wealth management & financial planning
- 7+ years of experience in financial services
- MBA (IIM Ahmedabad)



Jayant Furia

- Professional Chartered Accountant with 35 years of post qualification experience.
- Very good experience in Taxation & Commercial Laws
- Hands on experience on Accounting and Tax Optimization



Jignesh Gajjar

- He is a Certified Financial Planner (CFP) from FPSB India.
- He has a rich experience of 20+ years across Financial Services industry and has worked with companies like Aviva Life Insurance, IIFL, HDFC Bank.
- He has helped more than 1,500 doctors to reach Financial Freedom through FinnFit program.

FAQs

Q: Do I need any prior finance knowledge?

A: No. All concepts are explained from the ground up, in simple English. You just need a willingness to learn and a notebook!

Q: Will I receive a certificate?

A: Yes upon completing all seven modules and quizzes, you'll get a co-branded AMC Mumbai and Finnovate Certificate of Completion.

Q: Can I register more than one doctor in a single transaction?

A: No. One login is for one doctor each doctor must create a separate account to purchase the course.

Q: Is there an installment option for the fee?

A: No. Payment is a one-time, full-course fee.

Q: How long will I have access to course materials?

A: Course materials and resource links remain active in your portal for 15 days after each session.

Q: Are session recordings available?

A: Yes, replays are posted within 24 hours and stay accessible for 15 days after the session.

Q: What if I have technical issues on the day?

A: Contact our Zoom helpline on WhatsApp at +91-9819022600 or Email: hello@finnovate.in (Mon–Sat, 10 AM–6 PM IST).

Q: Will participation in discussions be confidential?

A: Absolutely. No personal financial details are shared outside the cohort; recordings exclude attendee video.

Fees & Payment

- **Course Fee:** ₹15,000+ 18% GST (₹17700/-)
- **Payment Modes:** UPI, net-banking, credit/debit cards.
- **Early bird** discount upto 21st May 2025 - 10000 + 18% GST = ₹11800
- **Deadline:** 15 June 2025

Technical & Participation Requirements :

- Stable internet (min. 5 Mbps).
- Zoom (latest version) on desktop or tablet.
- Quiet space, camera-on encouraged for best interaction.

Refund & Cancellation Policy:

- All fees are non-refundable and non-transferable.

Code of Conduct

- Course materials are for personal use only. Do not share, reproduce or distribute without AMC Mumbai's permission. In case of any dispute, AMC Mumbai's decision is final.

How to Register

1. **Visit** <https://rx.finnovate.in> or AMC Website / AMC Mumbai App
2. **Sign up**
3. **Go to Courses → Financial Planning for Healthcare Professionals**
4. **Complete payment**
5. **You'll receive joining instructions via email**

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About Finnovate

Finnovate was formed in 2007 with a mission to make every doctor financially fit. We work with doctors and their families to achieve their financial goals- safely, surely, and swiftly. We are officially associated with AMC as a financial literacy partner and we conduct financial literacy programs for various other associations like - IMA (multiple branches), Pune Surgical Society, FFPAL, Ahmedabad Medical Association and multiple speciality associations for doctors.

What sets us apart is our deep understanding of the medical profession and our commitment to delivering exceptional results.

In fact, some of the most eminent names in the medical community have been so impressed with our services that they've not only become clients, but have also invested in our business.

OUR JOURNEY IN NUMBERS

35,000+

Doctors Trained

3,000+

Doctors Families Served

4.9 /5

Average Rating

Need Help?

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