

**SWAMI KESHVANAND INSTITUTE OF
TECHNOLOGY, MANAGEMENT &
GRAMOTHAN, JAIPUR**



A REPORT

On

**FACULTY DEVELOPMENT
PROGRAMME**

On

**Tax Planning, Financial Planning & Filing of ITR
(21-25 February, 2024)**

ORGANISED BY

Department of Management Studies

Name of Host Institute: Swami Keshvanand Institute of Technology,
Management & Gramothan, Jaipur

Name of Department: Department of Management Studies

Title of the Faculty Development Programme: Tax Planning,
Financial Planning & Filing of ITR

Names of Faculty Coordinators: Dr. Ona Ladiwal

Name /Contact no. of host Institute Principal/Director:
Prof. (Dr.) Ramesh Kumar Pachar- (09414361980)

Maximum Number of Participants: 99

Date, Duration and Venue of the FDP: 5 days, 21 -25 February 2024

Level of the Event: National Level

Proposal

DEPARTMENT OF MANAGEMENT STUDIES

31st January 2024
To,
The Director (Academics)
SKIT, Jaipur.

Sir,
Reg: 5-Day FDP on Tax Planning, Financial Planning & Filing of ITR (Hybrid mode)

The Department of Management Studies, SKIT wishes to organize a 5-Day Faculty Development Programme in association with The Institute of Chartered Accountants of India for the Faculty Members of our SKIT. The theme of the FDP will be "**Tax Planning, Financial Planning & Filing of ITR**". It would be from 21 February 2024 to 25 February 2024 .

The topics to be covered in the FDP would be as follows:

- Identify Sources of Income disclosures,
- Investment opportunities & awareness,
- Computation of Total Income,
- Computation of Tax liability,
- Learn Filing of Income Tax Return
- Contemporary and Non-contemporary Investment alternatives.
- Financial Planning

We request you to approve the program in principle .


Coordinators-FDP

Dr. Ona Ladiwal

Dr. Ajay Verma

Mr. Tarun Sharma

Approved.
For financial support obtain approval
from the Management.

S. D. Sharma
12/21/24



Faculty Development Program (FDP)

on

Tax Planning, Financial Planning & Filing of ITR

About The FDP- The programme was equipped with the necessary and basic knowledge of direct tax to understand the taxation system, chargeability, source of income, tax obligations and compliance, filing of returns, accounts maintenance, systems of accounting, cash management, business transactions, tax system, tax management, financial management etc.

Program Objectives

- Expose the tax environment in India,
- Learn Tax Computation methods,
- Identify Sources of Income disclosures,
- Investment opportunities & awareness,
- Computation of Total Income,
- Computation of Tax liability,
- Learn Filing of Income Tax Return
- Contemporary and Non-contemporary Investment alternatives.
- Financial Planning

Outcome of FDP

The outcome of a Faculty Development Program (FDP) on financial planning, tax planning, and tax filing would typically include several key aspects:

Enhanced Knowledge: Participants would gain a deeper understanding of financial planning principles, tax laws, regulations, and filing procedures. They would learn about the importance of financial planning in achieving personal and professional goals and how tax planning plays a crucial role in optimizing finances.

Improved Skills: Through interactive sessions, case studies, and practical exercises, participants would develop practical skills in financial analysis, tax optimization strategies, and effective tax filing techniques. They would be better equipped to analyze financial situations, identify tax-saving opportunities, and prepare accurate tax returns.

Updated Information: Tax laws and regulations are subject to change, so participants would receive updated information on recent changes in tax laws and their implications for financial planning and tax filing. They would learn about recent tax reforms, deductions, credits, and other tax-saving strategies relevant to their professional practice.

Application in Practice: The FDP would focus on bridging the gap between theory and practice by providing participants with hands-on experience in financial planning and tax filing. They would learn how to apply theoretical concepts and strategies to real-life scenarios, enabling them to provide effective financial advice and tax services to clients or students.

Networking and Collaboration: Participants would have the opportunity to network with peers, industry experts, and faculty members during the FDP. They would exchange ideas, share best

practices, and collaborate on research projects or professional initiatives related to financial planning and tax management.

Professional Development: By completing the FDP, participants would enhance their credentials and professional development. They would receive a certificate of participation or completion, demonstrating their commitment to continuous learning and professional growth in the fields of financial planning and tax management.

Overall, the outcome of an FDP on financial planning, tax planning, and tax filing would empower participants with the knowledge, skills, and confidence to navigate complex financial landscapes, optimize tax liabilities, and provide valuable financial advice and services to clients or students.

The FDP began with a welcome address by Dr. Ona Ladiwal, HOD, DMS SKI T. In her speech she emphasized that “many of us engage in economic activity and work really hard to make a living. But as we work hard to make a living, it becomes imperative for us to work a little harder and smarter to save our taxes. She says that very often it is seen that many individuals keep their tax planning exercise pending till the eleventh hour.

They prefer splurging on things of materialistic interest which leads them to sub-optimally save tax.” He later concluded by saying that this extensive FDP will take you through the concept of Tax Planning and financial planning in detail.

Day 1 21 February 2024 The programme proceeded with the first session by **CA Kuldeep Gupta** on Sources of Income (Salaried, Professional, Shares, Interest. Sessions on sources of income often aim to educate individuals on how to diversify their income streams, maximize earning potential, and achieve financial stability. Understanding the various sources of income available can help individuals make informed decisions about their financial planning, investment strategies, and overall wealth management.

On day 2, 22 February 2024 the session was taken by CA Naveen Gupta on “Investment opportunities & awareness.” In this session, participants likely learned about various investment avenues, strategies, and the importance of being aware of different investment opportunities.

On day 3, 23 February 2024 the speaker CA Mohit Agarwal taken session on Computation of Total Income & Tax Facility. where he explained “How to File ITR in the new portal”. He also explained about some of the common deductions available to taxpayers are under Section 80C, Section 80D, Section 80CCC, Section 80CCD, Section 80CCE, Section 80E and Section 80G of the Act amongst others.

On day 4, 24 February 2024 Mr. Bharat Sharma-CEO India Hedge ,(Stonerve) highlighted the importance of Financial Planning for Individuals. His session was on Contemporary and Non-contemporary investment alternatives. Taking the session forward he emphasized having a personal financial plan that will help maintain discipline towards maintaining within set targets and thus achieving the Goals.

On day 4, 25 February 2024 CA Prashant Sipani emphasized on Portfolio Management . Portfolio Management typically refers to the process of managing various investments and assets to achieve specific financial goals. It involves selecting and overseeing a mix of investments that suit an individual's or organization's objectives, risk tolerance, and time horizon.

Brochure and Poster of the Event:



SWAMI KESHVANAND INSTITUTE OF TECHNOLOGY,
MANAGEMENT & GRAMOTHAN, JAIPUR

DEPARTMENT OF MANAGEMENT STUDIES
In association with
The Institute of Chartered Accountants of India
Jaipur Branch

Organizes

Faculty Development Program

on

Tax Planning, Financial Planning
&
Filing of ITR

Date: 21 February To 25 February 2024



Details of the Schedule:

Details (Execution)

Venue- APJ Abdul Kalam Seminar Hall, Department of Management Studies, SKIT

Date-21 February 2024 (offline)	
1.15-1.30 PM	Inaugural Session
1.30-3.00 PM	Session –Identify Sources of Income disclosures -CA Kuldeep Gupta
Date-22 February 2024 (offline)	
1.30-3.00 PM	Session II: Investment opportunities & awareness.-CA Naveen Gupta
Date-23 February 2024 (offline)	
1.30-3.00 PM	Session III: Computation of Total Income &Tax Facility –CA Mohit Agarwal
Date-24 February 2024 (Online)	
10.00 am to 11.00 am	Session IV- Contemporary and Non-contemporary Investment alternatives. Mr. Bharat Sharma-CEO Stocnerv Learning Private Lmt./India Hedge
Date-25 February 2024 (online)	
10.00 am to 11.00 am	Session V- CA Prashant Sipani –Financial Planning and Portfolio Management

**Swami Keshvanand Institute of Technology, Management &
Gramothan**

Department of Management Studies

FDP

on

Tax Planning, Financial Planning & Filing of ITR

February 21-25, 2024

List of Participants

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		Management and Gramothan	
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Photos of the Event









FACULTY DEVELOPMENT PROGRAMME

On

**Tax Planning, Financial Planning & Filing of ITR
(21-25 February, 2024)**

Feedback form

Feedback form

Tax
Planning, Financial Planning & Filing of ITR

(21-25
February, 2024)

Name of Participant

Your answer

Name of Institute

Your answer

E Mail Id

Your answer

Your Exerince about FDP

- Bad
- Average
- Above Average
- Excellent

Certificates of Participants and Speakers



Swami Keshvanand Institute of Technology,
Management & Gramothan, Jaipur
Faculty Development Program
on
Tax Planning, Financial Planning & Filing of ITR
organized by
Department of Management Studies
(FEBRUARY 21-25, 2024)

CERTIFICATE OF PARTICIPATION

This is to certify thatDr. Maneesha Kausik..... of
.....D.M.S., SKIT..... has successfully attended the Faculty
Development Program on **Tax Planning, Financial Planning & Filing of ITR** from
21 February to 25 February, 2024 organized by Department of Management Studies.

Jaipal Meel
Director

Prof. S. L. Surana
Director (Academics)

Dr. R. K. Pachar
Principal

Dr. R. K. Jain
Dean

Dr. Orfa Ladiwal
(HOD-DMS)

