

Shri Gujarati Samaj, Indore  
P.M.B. Gujarati Commerce College, Indore  
(DAVV, Indore)



BBA & BCom. I Year  
Vocational Subject: Financial Services & Insurance  
Practical File

Session : 2024-25

(For partial fulfillment of Graduation in Management/Commerce)

Name of the Student : .....

Section & No. : .....

University Enrollment No. : .....

University Roll No. : .....

Submitted to : Dr. Priya Jain

## VOCATIONAL SUBJECT PRACTICAL FILE TOPICS

Subject: Financial Services and Insurance

B.COM / BBA I YEAR

(All topics are compulsory to be written in practical file)

- TOPIC 1. Practice Online bank account opening E-Banking operations and UPI transfer payment
- TOPIC 2. Prepare the documents of a hypothetical Insurance claim.
- TOPIC 3. Visit to bank or insurance company to observe their functioning.
- TOPIC 4. Presentation by chart and model about various functions of bank and Insurance Company.
- TOPIC 5. Role play by an insurance agent, mutual fund consultant, stock broker, investment advisor, and portfolio manager.

## INSTRUCTION TO PREPARE PRACTICAL FILE

### TOPIC 1

- Procedure for account opening and required document.
- e-banking operations NEFT RTGS (collect the forms)
- UPI transfer procedure for linking the bank account to GPA Paytm Bharat pay.

### TOPIC 2

- How to fill Insurance claim. What document are required at the time of filling a claim to Insurance Company (collect either of the claim document - Life Insurance /Health Insurance/Motor insurance)

### TOPIC 3

- Prepare visit report after visiting to any bank or insurance company office for the purpose of collecting various information about their functioning.

### TOPIC 4

- For topic for you can take help of any kind of study material available online or offline.

### TOPIC 5

- For topic for you can take help of any kind of study material available online or offline.