Certified Financial Planner®

CFP®

Enhance your Career in Personal Finance with CFP®

+22 More Countries...

FPSB INDIA

ABOUT CFP® CERTIFICATION

The CERTIFIED FINANCIAL PLANNER® certification is the most desired and recognised certification in personal finance. The course is governed and administered by the Financial Planning Standards Board - India

The CFP® certification is highly regarded in the financial services industry, and CFP® professionals often work as financial advisors, wealth managers, financial planners, and other roles where they assist clients in achieving their financial goals and making informed financial decisions.

- **The Gold standard for Excellence and Trust in the Personal Financial Planning Industry**
- **Globally recognised certification over 27 countries including US, UK, Australia, Canada, Germany etc. in the field of personal finance**
- **Emphasizes on developing advanced skills in comprehensive financial planning, portfolio management, risk management & investment management**

WHY CFP® CERTIFICATION?

- ***#1 Personal Finance Qualification***
- *Short Duration - **6 Months to 1 Year***
- ***70% Higher Salary** than normal graduates*
- ***Career Advancement** and Promotion for Working Professionals*
- ***Entrepreneurship** in **Financial Advisory***
- *High Passing Rate - **Upto 70% result***
- *CFP® is one of the criteria to become a **SEBI Registered Investment Advisor (RIA)***

ROADMAP

CFP® CURRICULUM

A) INVESTMENT PLANNING SPECIALIST CERTIFICATION

- *Personal Financial Management*
  Time Value of Money, Financial Management Strategies, Cash management, Debt Management, etc
- *Investment Planning and Asset Management*
  Asset classes, Investment Products, Wealth Management, Financial Markets, Financial Planning, etc
- *Regulatory Environment, Law and Compliance*
  Economic Environment, Anti-Money Laundering, Role of regulators, etc

B) RETIREMENT AND TAX PLANNING SPECIALIST CERTIFICATION

- *Retirement Planning*
  Principles & Objectives, Retirement need analysis, Pension reforms, Retirement products, Employee benefits, etc
- *Tax Planning and Optimization*
  Global Taxation for individual, Tax planning strategies, Cross border taxation, Income tax computation, Capital gains & other heads of income, Exemption & deductions, etc

C) RISK MANAGEMENT AND ESTATE PLANNING SPECIALIST CERTIFICATION

- *Risk management*
  Principles of risk management, Insurance Company, Life Insurance, General Insurance, etc
- *Estate Planning*
  Estate Planning & wealth distribution, Will & trust, Estate planning process, Testamentary Succession

D) INTEGRATED FINANCIAL PLANNING COURSE & FINANCIAL PLAN ASSESSMENT

- *Financial Planning Principles, Process and Skills*
  Financial planning process, professional skills, Critical Thinking
- *Integrated Financial Planning*
  Goal setting, Analysing information, Designing Financial Plan & Financial Plan recommendations.

EXAM PATTERN

MODULES	NO OF QUESTION	TOTAL MARKS	PATTERN
INVESTMENT PLANNING SPECIALIST	75	75	MCQ's
RETIREMENT AND TAX PLANNING SPECIALIST	75	75	MCQ's
RISK AND ESTATE PLANNING	75	75	MCQ's
INTEGRATED FINANCIAL PLANNING & FINANCIAL PLAN ASSESSMENT	50	100	CASE STUDY-BASED QUESTIONS – 25 Q THEORY BASED QUESTIONS – 25 Q & CONSTRUCTION OF FINANCIAL PLAN

HAVE WHAT IT TAKES?

Regular Pathway: Regular mode involves clearing all the exams.

Eligibility:

- 12th or equivalent qualification from any field
- Graduate in Any Domain

Challenge Pathway: Integrated Financial Planning & Financial Plan Assessment

Eligibility:

- Relevant professional qualifications like PG, MBA , CA (inter) & More
- At least three years of prior work experience in the field of BFSI

OPPORTUNITIES TO WORK WITH

- *MNC's, Banks, Wealth Management companies, Mutual fund houses and more are looking to hire you*

WHY FPA?

- AUTHORIZED EDUCATION PROVIDER FOR CFP® CERTIFICATION SINCE 15 YRS+
- CFP® / CFA / CA QUALIFIED FACULTIES
- 100% PLACEMENT ASSISTANCE
- BETTER PASS RATE THAN THE GLOBAL AVERAGE
- LIVE OFFLINE / ONLINE SESSIONS
- INDUSTRY EXPERT GUEST LECTURES
- MOCKS AND QUESTION BANK FOR PRACTICE ALONG WITH RECORDED LECTURES
- 50% DISCOUNT ON FPSB INDIA STUDY MATERIAL
- WORLD CLASS LEARNING MANAGEMENT SYSTEM TO TRACK STUDENT'S PROGRESS
- 1:1 MENTORSHIP AND STUDY PLAN
- ALUMNI NETWORK OVER 11K+ STUDENTS
- NO INTEREST EMI

TESTIMONIALS

I am happy to share that I have cleared CFP - Final Module with a Good Grade on the first attempt. I am very grateful to Janak Sir, Sagar Sir, Yukti Ma'am and all doubt-solving faculties for teaching and guiding me in completing my CFP. I would recommend FPA to everyone

Palak

The quality of faculty over here especially Jeetu Sir and Yukti Ma'am is exceptionally great. They solve your doubts during and after the lectures. They help you in every way possible. Surely going to recommend FPA to anyone, who is looking for pursuing CFP Certification.

Vedant Kelkar

I would like to thank the entire FPA team for helping me clear the CFP examination within the stipulated time frame. The video lectures of Yukti ma'am and the doubt-solving assistance of Mansi ma'am and Pooja ma'am were really helpful. I would recommend anyone pursuing CFP Certification only choose FPA.

Shaurya Talwar

I have cleared my CFP. Much thanks to FPA. Jeetendar Sir has regularly offered timely support and guidance, as well as other faculty members and support staff. Would like to mention Sagar Sir, Yukti Ma'am and Aman Sir for their time, effort and patience with all students

Jash Kriplani

I have cleared CFP throughout with the help of FPA. The videos & material are detailed and helpful. And faculties are also very supportive, even distance learning can help students too. A day before the exam it helped me a lot. Big thanks to everyone, and FPA Rocks!!

Sonali Karia

OUR STUDENTS ARE AT

SHIKHA PANCHAL

1 FINANCE COMPANY
FINANCIAL PLANNER

AARYAN PAREKH

TJS FINANCIAL SERVICES
CLIENT RELATION EXECUTIVE

BALRAJ

KPMG
ASSOCIATE CONSULTANT

RAHUL RAI

ICICI PRUDENTIAL MUTUAL FUND
DEPUTY MANAGER

JEEL JAIN

IMMPL
FINANCIAL PLANNER

POOJA MEHTA

DEUTSCHE BANK
FINANCIAL ANALYST

HARPREET BEDI

AXIS MUTUAL FUND
CLUSTER MANAGER

ELORA PAUL

ANANDRATHI
RELATIONSHIP MANAGER

DHAIRYA SHAH

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