



FP&B INDIA

CFP®

CERTIFIED FINANCIAL PLANNER

Enhance your career in **Personal Finance** with **CFP®**

About FPA

FPA Edutech (FPA) is one of India's leading training companies in the Accounting & Finance space. Over the last 15 years, we have trained over 5,00,000+ students and working professionals in various courses globally, helping them fulfill their career aspirations.

FPA is amongst the **Oldest Training Partners & a Premium Education Provider** for FPSB India to train for the CFP certification program. FPA is also an ACCA Platinum Approved Learning Partner, a Silver Approved Learning Partner for CMA (US) & a sort after name for CFA, CISI.

About CFP® Certification

The CERTIFIED FINANCIAL PLANNER® certification is the most desired and recognized 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



+22 More Countries...

Why CFP® Certification?



**#1 Personal Finance
Qualification**



**6 Months
to 1 Year**



**70% Higher
Salary**



**Career
Advancement**



**Entrepreneurship
in Financial
Advisory**



**High Passing
Rate - Upto 70%
result**



**International
Recognition**

Roadmap

Register



**Specialist Exams
(Investment, Retirement
& Tax, Risk & Estate)**



**Gain relevant
Work Experience**



**Basics of
Personal Finance**



**Integrated Financial
Planning & Financial
Plan Construction**



CFP® Certified



CFP[®] Curriculum

1 Module

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

2 Module

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

3 Module

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

4 Module

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 Plans & Financial Plan recommendations.

Exam Pattern

Modules	No. of Questions	Total Marks	Pattern
Investment Planning Specialist	75	75	MCQ's
Retirement and Tax Planning Specialist	75	75	MCQ's
Risk & Estate Planning Specialist	75	75	MCQ's
Integrated Financial Planning Course & Financial Plan Assessment	50	100	Case Study - based Questions - 25Q Theory Based Questions - 25Q & Construction of Financial Plan

Eligibility Criteria

Regular Pathway



12th or equivalent qualification from any field



Graduate in Any Domain

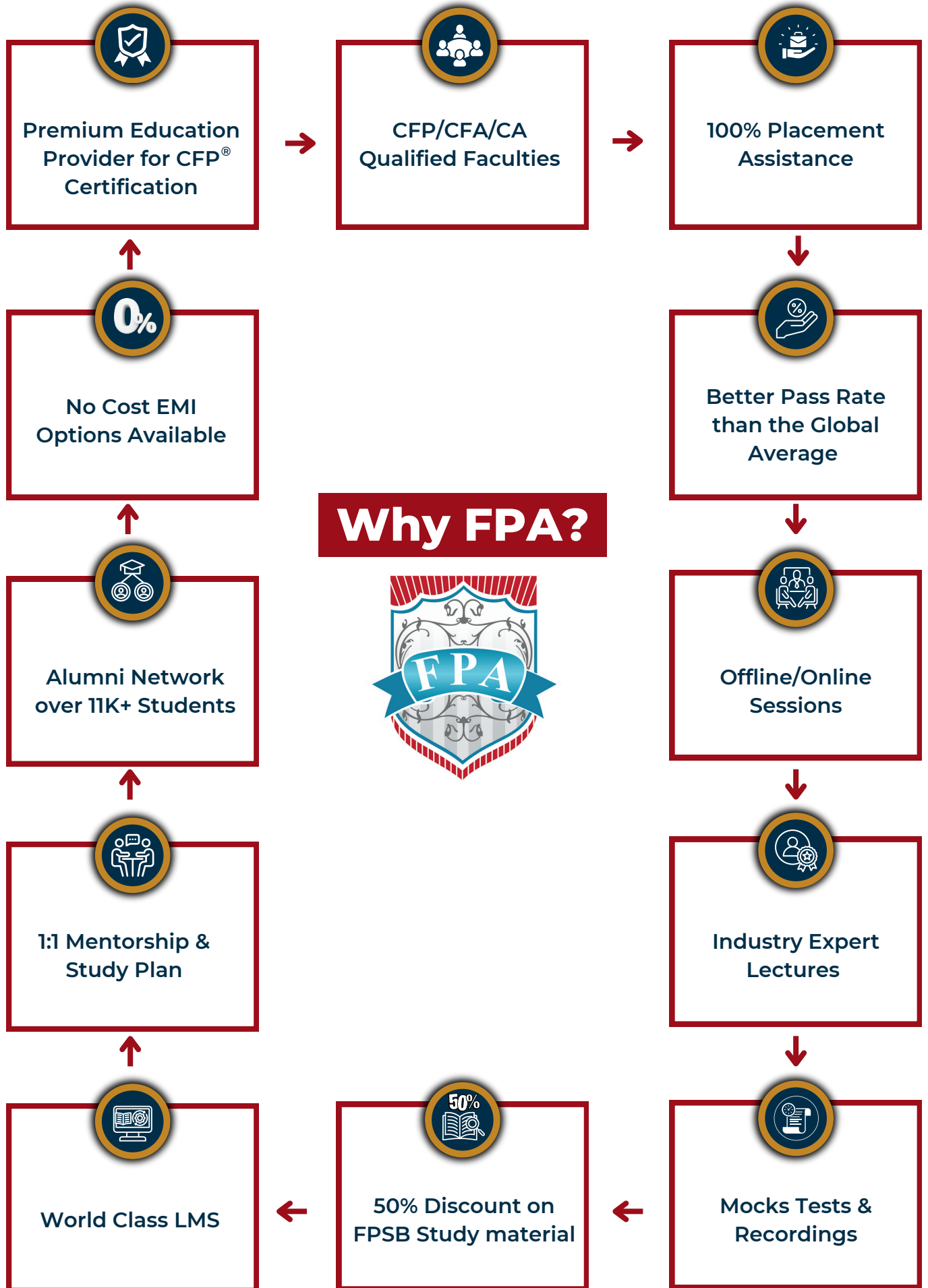
Challenge Pathway



Relevant professional qualifications like
PG, MBA, CA (inter) & More



At least three years of prior work
experience in the field of BFSI



★★★★★ 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 the 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** ★★★★★



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