

CFP^{CM} FINANCIAL PLANNING

- › Save upto 250\$ on FPSB fees
- › India's leading training provider
- › Trained 20,000+ students

proschool
An **ims** Initiative



HOW DOES CFP HELP YOU?

It is the highest level of certification awarded to individuals globally in the field of Financial Planning. It prepares aspirants to successfully build a career in the booming financial advisory services industry in India as well as across the globe.

Aspirants can balance their work whilst clearing each of the three specializations one at a time. Each specialization adds significant credibility to the aspirants profile. On clearing all three the aspirant can appear for the final certification.

GET THE CFP ADVANTAGE



Be among the best financial planning professionals world-wide



According to the FPSB survey, year on year the demand for CFP's are rising by 10% in India.



Supports the Corporate career working for advisory firms and also Setup ones own advisory service



Allows diverse career specializations in Investment Planning, Tax specialist, Estate & more

WHO CAN PURSUE CFP^{CM}



Undergraduate students aiming to build a career in finance



Financial advisers wanting to increase credibility



Executives in the BFSI sector willing to shift to Financial Planning

SALARY & CAREER STAGES

MID LEVEL

Type of Roles:
Sr Financial Planner,
Regional Manager,
Heading Wealth

Rs. 5 Lakhs to
Rs. 10 Lakhs



SENIOR LEVEL

Type of Roles:
Director of Financial

Above Rs. 10 Lakhs

JUNIOR LEVEL

Type of Roles:
Relationship Manager,

Rs. 2 Lakhs to
Rs. 5 Lakhs

CURRICULUM

Module 0

Financial Planning Basics

Introduction to Financial Planning

- › Establish a client relationship
- › Assess Client's Financial position

Financial Mathematics

- › Time Value of Money
- › Amortization & Debt
- › Annuity & Real rate of return
- › Irregular cash flows, NPV & IRR

Financial Planning

- › Insurance planning
- › Retirement planning
- › Tax and Estate planning



Certificate of Completion from Proschool

Module 1

Investment Planning & Advisory

Personal Financial Management

- › Time Value of Money
- › Cash Flow & Budgeting
- › Financial Management Strategies

Investments & Asset Management

- › Asset Classes & Securities
- › Asset Allocation & Wealth Management
- › Behavioral Finance & Investment Theory

Regulatory Environment, Law/ Compliance

- › Social & Political Environment
- › Compliance & Implications
- › Indian Corporate Laws



NISM Investment Advisor Level I certificate



FPSB Investment Planning specialist certificate

Module 2

Retirement & Tax Planning Specialist

Retirement Planning

- › Retirement Needs, Analysis & Projection
- › Sources of Retirement Cashflow
- › Withdrawal Projections & Strategies

Tax Planning & Optimization

- › International Taxation
- › Cross Border & Source Rules
- › Accounting Standards & research

Indian Aspects

- › Retirement Products in India
- › Indian Taxation rules
- › Tax aspects of retirement products

Module 3

Risk & Estate Planning

Risk Management & Insurance Planning

- › Principals of Risk Management
- › Intro to Insurance
- › Advisor Selection & Strategic Management

Estate Planning

- › Terminology
- › Wealth Distribution
- › Transfer during life & at death

Indian Aspects

- › Life & General Insurance
- › Indian Succession Laws
- › Insurance regulatory aspects

Module 4

Integrated Financial Planning

The Financial Planning Process

- › Practise Standards
- › Professional Skills
- › Client engagement & Communication

Engaging Clients for Life

- › Discovery process & Appreciative enquiry
- › Developing financial plans
- › Presenting recommendations to clients

Developing Effective financial plans

- › Financial Planning Overview
- › Financial Plan elements
- › Financial Plan Assessment

ELIGIBILITY

- I. 12th pass students from any stream Science Commerce & Arts can apply
- II. Undergraduates, Graduates & Post Graduates BCom, BFM, BBA, MBA, M.Com, CA & CA-inter
- III. Individuals working in the field of Stock Broking, Mutual Funds /Insurance Advisors & Banking Professionals

FACULTY

Zeal Doshi

CFP | CFA® Level I
Financial Planner |
Personal Finance Trainer



Ankit Dani

CFP | BE Hons |
PGDM in Marketing



Dishit Parekh

CA | CFP |
Founder - Foresight
Financial Advisory



HOW IT WORKS?

- > Register with Proschool for study program
- > Complete the M0 module with our mentors
- > Register with FPSB under our guidance
- > Complete your course program with Proschool
- > Appear for CFP exam conducted by FPSB

CERTIFICATIONS



CFP^{CM} Certification
Financial Planning
Standards Board (FPSB)



NISM Certification
Investment Advisor
Level I & II

PROGRAM HIGHLIGHTS



STUDY OPTIONS



Classroom Training (Andheri & Thane)

Tutored by industry professionals with excel based training and updated study material



Online Training

Live and interactive training program with recorded lectures for future reference



Distance Learning

Online updated study material for effective preparation

ABOUT PROSCHOOL

IMS has been ranked as one of the Most Trusted education brands in the country. Proschool enjoys the same trust as it delivers practical skills and knowledge to make students job ready. Our programs are built on three pillars: International Quality, Affordable Cost and Shortest Time.

Leading company for professional studies

- › Ranked among top 10 leaders in Finance and Accounting
- › Prep provider for CFA, CFP and Investment finance
- › Trained over 50,000 students in last 10 years
- › Proven placement track record in core finance roles

PROGRAMS

Finance Analyst : CFA® Program | Financial Modeling | PGP- IBCM
Management Accounting : CIMA | PGP in Management Accounting
Accounting : ACCA | IFRS
Analytics : Business Analytics | PGD in Data Science
Marketing : Digital Marketing

OUR CENTRES

MUMBAI	DELHI	SOUTH	OTHER
Andheri +91 9867842800	Connaught Place +91 7304957442	Chennai +91 9600137479	Kolkata +91 8591956474
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