





#### **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<sup>CM</sup>



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





## SENIOR LEVEL

**Type of Roles:**Director of Financial

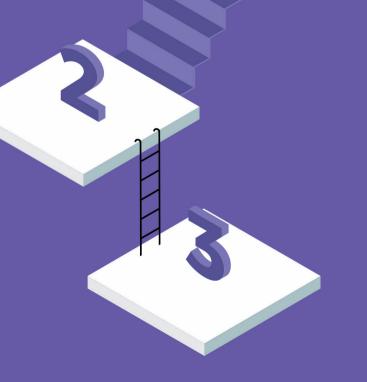
**Above Rs. 10 Lakhs** 

#### MID LEVEL

**Type of Roles:**Sr Financial Planner,

Regional Manager, Heading Wealth

Rs. 5 Lakhs to Rs. 10 Lakhs



#### JUNIOR LEVEL

**Type of Roles:**Relationship Manager,

Rs. 2 Lakhs to Rs. 5 Lakhs

#### 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

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

Investments &

- Asset Classes & Securities
- Asset Management
- > Asset Allocation & Wealth Management > Behavioral Finance & Investment Theory
- Regulatory Environment,
- Social & Political Environment > Compliance & Implications
- Law/ Compliance
- > 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

> Principals of Risk Management > Intro to Insurance

& Insurance Planning

› Advisor Selection & Strategic Management

**Estate Planning** 

- → Terminology
- > Wealth Distribution
- > Transfer during life & at death

Indian Aspects

> Insurance regulatory aspects

> Indian Succession Laws

> Life & General Insurance

**Integrated Financial Planning** 

**Module 4** 

The Financial Planning Process

> Professional Skills

> Practise Standards

› Client engagement & Communication

**Engaging Clients** 

Developing financial plans

for Life

Discovery process & Appreciative enquiry

> Presenting recommendations to clients

Developing Effective financial

> Financial Planning Overview > Financial Plan elements

plans

> Financial Plan Assessment

#### **ELIGIBILITY**

- 12th pass students from any stream Science Commerce & Arts can apply
- Undergraduates, Graduates & Post Graduates BCom, BFM, BBA, MBA, M.Com, CA & CA-inter
- 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**

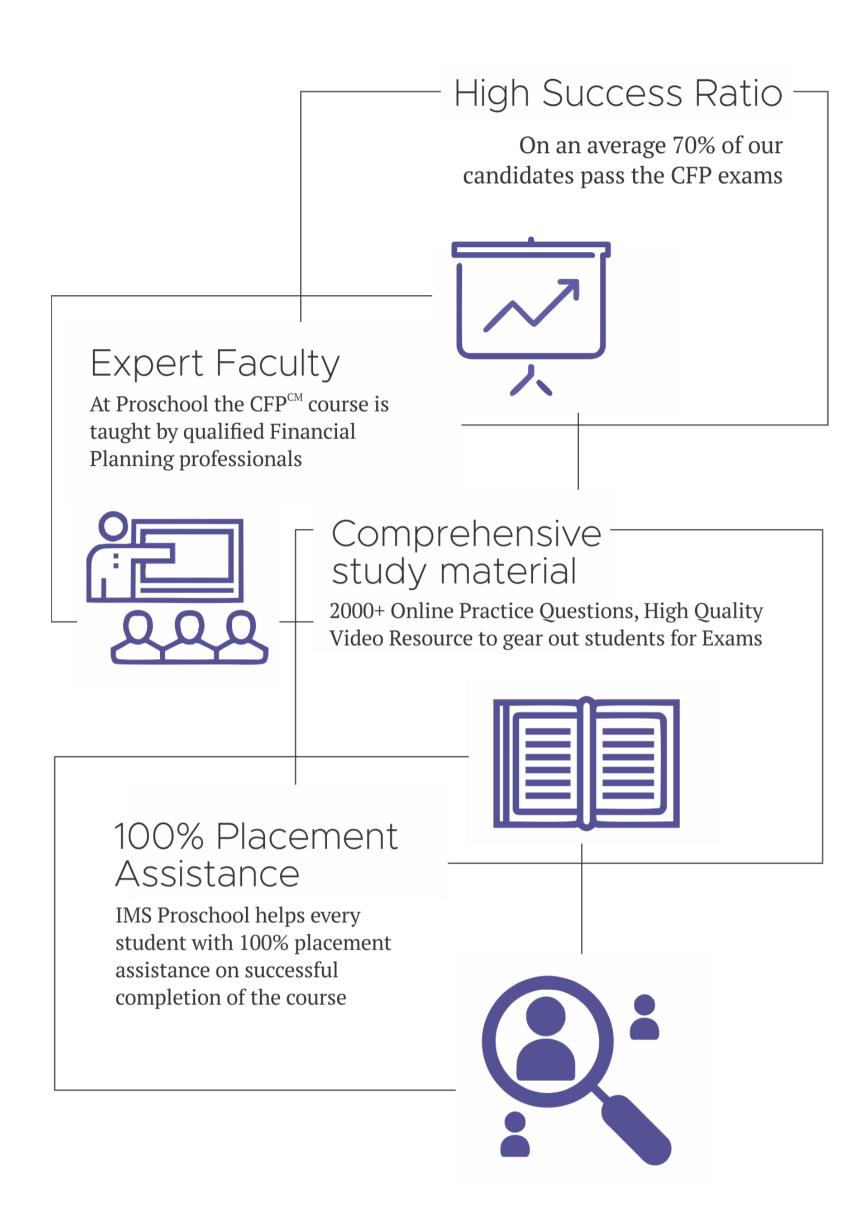


**CFP**<sup>CM</sup> **Certification**Financial Planning
Standards Board (FPSB)



NISM Certification
Investment Advisor
Level I & II

#### **PROGRAM HIGHLIGHTS**



## **STUDY OPTIONS**



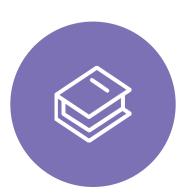
#### **Classroom Training (Andheri & Thane)**

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
Sion +91 09619207323	Pitampura +91 9136687002	Kochi +91 9645629999	   Pune   +91 8454988892
Thane +91 9867842800	Gurgaon +91 7304957442	Hyderabad +91 9136908879	Lucknow +91 9004745469
Navi Mumbai +91 9867842800	Noida +91 7304957442	Bengaluru +91 7892295842	Online +91 9867994700
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