



CFP[®]

**CERTIFIED FINANCIAL
PLANNER**



**Trained
20,000+
Students**

**India's
Leading
Training
Provider**

**Save
50% on FPSB
e-Books**

IMS Proschool
Trust the leader

About CFP®

The Certified Financial Planner (CFP®) certification is the gold standard in personal finance and wealth management, recognized in over 28+ territories. Governed by the Financial Planning Standards Board (FPSB), it sets the benchmark for competence, ethics, and professionalism in the financial advisory industry.

CFP® equips you with comprehensive knowledge and practical skills across core areas like investment planning, tax, insurance, retirement, and estate planning. Whether you're beginning your career or looking to upskill, CFP® offers flexible learning options to help you balance work and study at your own pace.

Why do CFP®?

For Professional Reasons

- 1 Kickstart a High-Growth Career**
Open to 12th+ candidates, the CFP® certification is a powerful launchpad into leading firms like HDFC, ICICI, Citibank, and Motilal Oswal. It's the perfect start for a career in Wealth Management and Financial Advisory.
- 2 Stable Role with Opportunities to Start Own Advisory**
CFPs manage HNI clients, scale up to CXO roles, or launch their own advisory firms. It's a respected, future-proof career path with real growth potential.

For Personal Reasons

- 1 Financial Literacy is Life Literacy**
Managing your money is an essential life skill. Many iconic personalities like Michael Jackson (~\$500 million debt at death), Mike Tyson, and others faced financial ruin due to poor money management. CFP empowers you to avoid such mistakes and take charge of your financial future.
- 2 It's Never Too Late to Start**
Whether you're a student, working professional, or near retirement, it's always the right time to learn personal finance. The CFP course gives you global tools to plan, protect, and grow your wealth.

Who Should Pursue CFP®?



Undergraduate students aiming to build a career in finance



Independent advisers wanting to increase credibility & clients

Working professionals looking to improve upskill



Affluent investors looking to manage their own funds

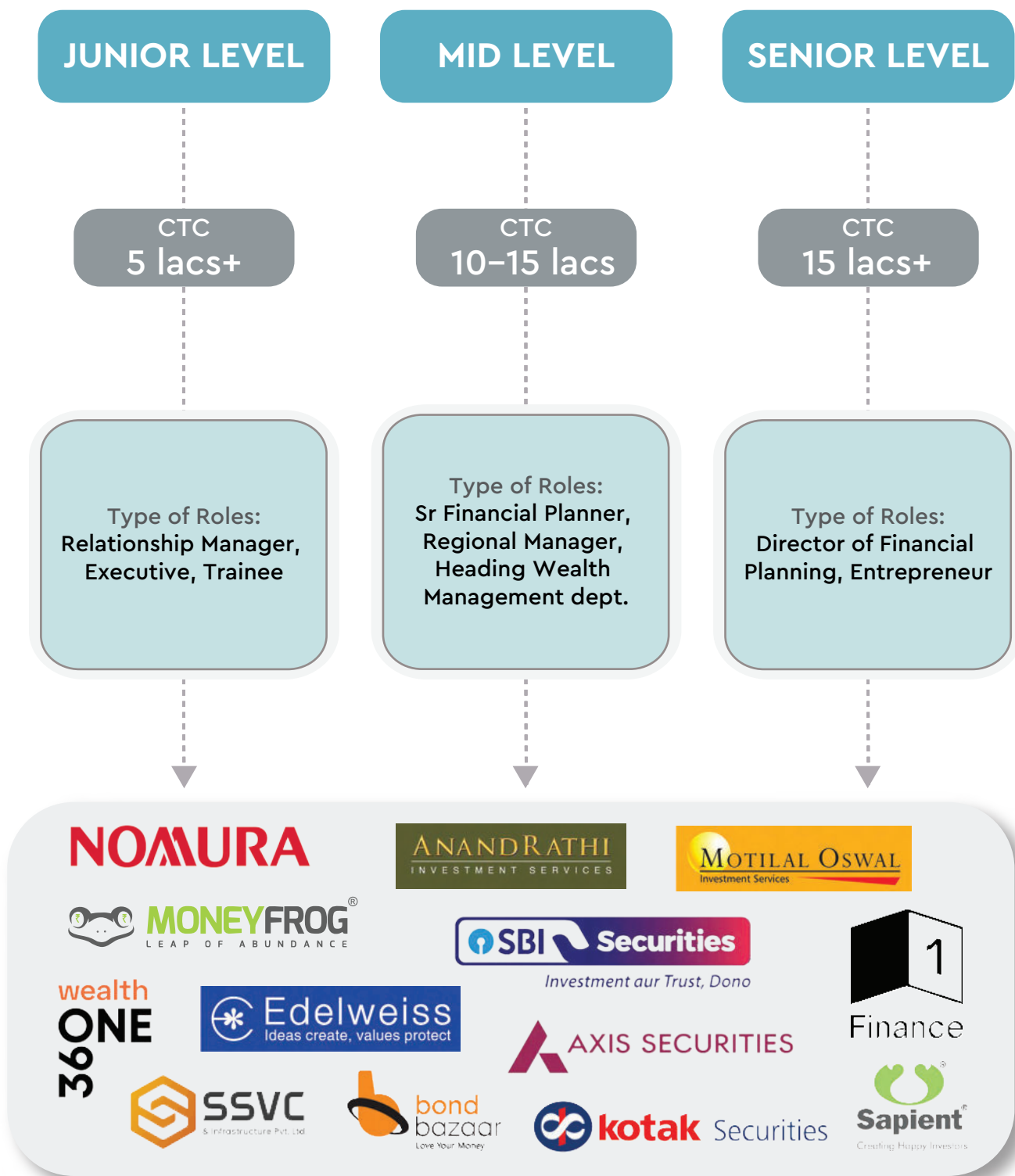


IMS Proschool is the best for CFP prep! The material matches the FPSB exam pattern, which really boosted my confidence.

- Aman Sharma



CFP Job Profiles



100% Job Assistance



Employability Grooming:

Including CV building, aptitude tests, communication skills, mock interviews, 1-on-1 mentorship focus on soft skills.



Curated Job Opening:

Proschool guarantees at least 5 entry-level job listings that match the course curriculum. Lateral roles are listed on a case to case basis.



Interview Coordination:

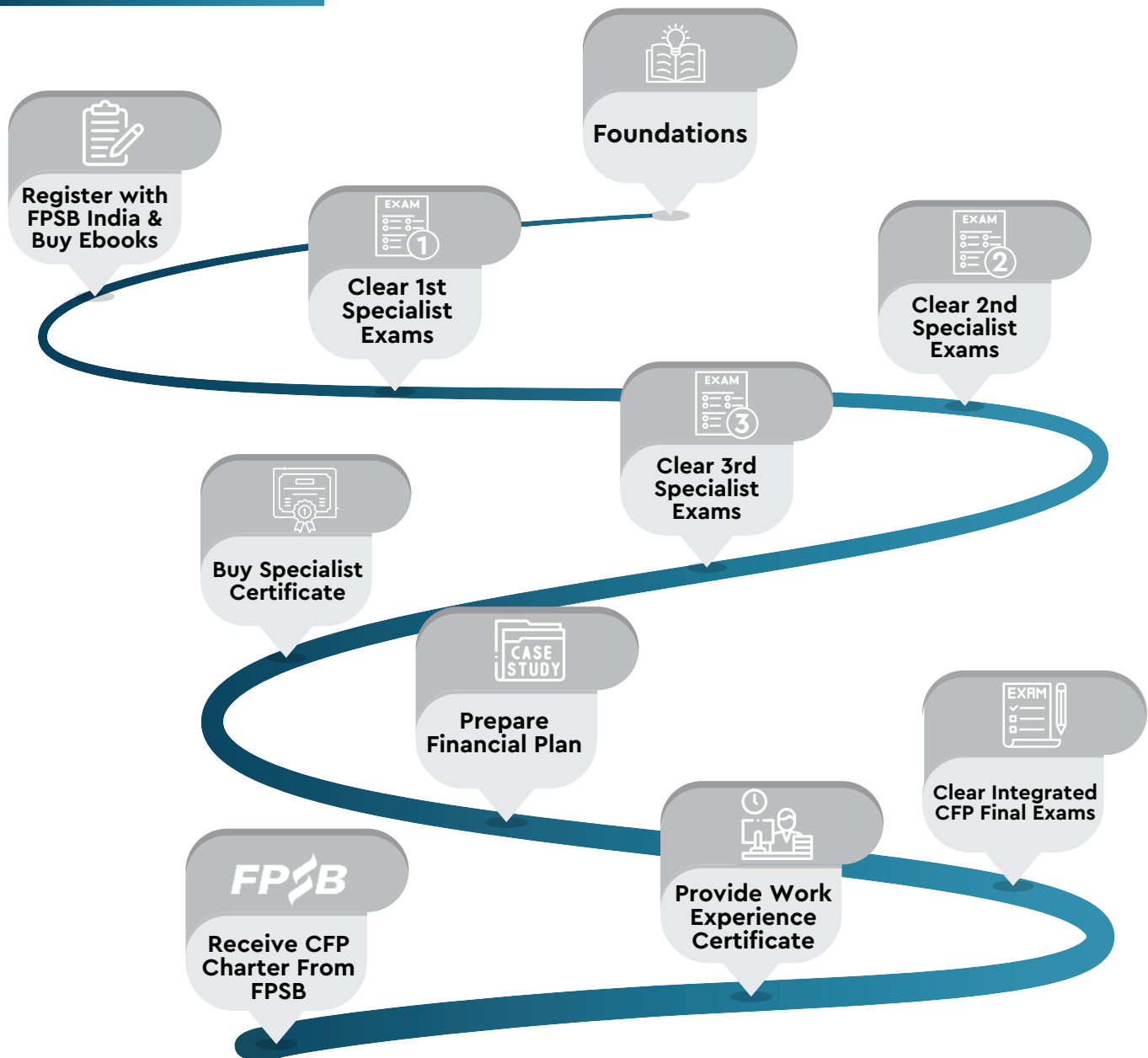
Shortlisted students receive personalized handholding through all interview stages.



Job Assurance:

Students applying for entry level roles are assured at least 3 shortlists within 6 months of course completion.

CFP[®] Roadmap



Course Highlights

High Success Ratio:

On an **Average 80%** of our candidates pass the CFP Exams.

i

Expert Faculty:

At Proschool CFP course is taught by qualified Financial Planning professionals.

ii

Comprehensive Study Material:

2000+ Online Practice Question, (as per Bloom Taxonomy) High Quality Video Resource to gear out students for Exams.

iii

100% Placement Assistance:

IMS Proschool helps every student with 100% Placement assistance on successful completion of the course.

iv



Grateful to start my wealth management career through Proschool. Their support and the CFP course were key. Highly recommend to finance aspirants!

- Utkarsh Agrawal



Curriculum

SYLLABUS

Module 0: Finance Foundation

0.1. Microsoft Excel

- › Basic/Intermediate/Advanced & Data Visualization

0.2. Financial Mathematics

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

Module 1: Investment Planning Specialist

1.1. Personal Financial Management

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

1.2. Investments & Asset Management

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

1.3. Regulatory Environment, Law/ Compliance

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

Module 2: Retirement & Tax Planning Specialist

2.1. Retirement Planning

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

2.2. Tax Planning & Optimization

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

2.3. Indian Aspects

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

Module 3: Risk & Estate Planning Specialist

3.1. Risk Management & Insurance Planning

- › Principles of Risk Management
- › Intro to Insurance (Life, General), Regulatory Aspects
- › Advisor Selection & Strategic Management

3.2. Estate Planning

- › Terminology
- › Wealth Distribution & Indian Succession Laws
- › Transfer during life & at death

Module 4: Integrated Financial Planning

4.1. The Financial Planning Process

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

4.2. Engaging Clients for Life

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

4.3. Developing Effective Financial Plans

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

CFP[®] Roadmap

FPSB, offers two different pathways to pursue the Certified Financial Planner Certification

FPSB FEES STRUCTURE

FPSB Registration	₹ 18,000
Course Material: IPS/RTPS/REPS (3 Specialist) (3250 x 3) 50% Waiver off (IMS Proschool)	₹ 9,750
Exam Fees IPS/RTPS/REPS (8000 x 3)	₹ 24,000
Specialist Certificate	₹ 10,500
Course material IFP 50% Waiver off (IMS Proschool)	₹ 6,500
IFP Exam	₹ 25,000
Total:	₹ 93,750

Regular Pathway:

The regular pathway is for anyone who has completed **12th grade** at the time of enrollment. Under this pathway, candidates take exams for all four levels. Regular pathway candidates receive specialist certification for each level exam.

Regular vs Fast Track Pathway

Fast Track Pathway:

This route is meant for experienced finance professionals: **a postgraduate in finance with at least 3 years of relevant professional experience.** Under this pathway, candidates are exempted from the first three exams and can directly take a single exam, Integrated Financial Planning, to acquire the CFP certification.

FPSB FEES STRUCTURE

Document Verification	₹ 5,000
BUNDLED PRICE FPSB Registration (Subject to Approval) + Full Course material (IPS/RTPS/REPS/IFP)	₹ 34,000
BUNDLED PRICE Financial Plan Assessment + CFP Exam	₹ 25,000
CFP Certification [®]	₹ 10,500
Total:	₹ 74,500




I appreciate the faculty's teaching and online lectures. They also offer placement sessions that provide advice on interview preparation and resume building.

- Rutuja Vaidya




Classroom Batch Reviews




Teja Teju

I recently completed my CFP course from IMS Proschool and had an excellent experience. The study materials, quizzes, and mock tests were a great help in clearing my exams. Special thanks to Zeal Doshi ma'am for her concept based teaching, and to Priya ma'am and Rushi sir for their support. Highly recommend IMS Proschool!




Sameer Paygude

The faculty engaged with every student, a major plus point of the Proschool, as they interacted individually and offered help.



Rama Tiwari

I've been pursuing CFP with IMS Proschool for a few months, and it's been a great experience. Special thanks to Sagar Sir for his expert, student-friendly teaching and constant support. The batch coordinator and admin team are also very helpful. Grateful to Rushi Sir and Priya Ma'am for their continued guidance.




Samiksha Jadhav

I'm pursuing the CFP course with IMS Proschool and it's been a great experience! The structured curriculum, regular quizzes, and interactive classes by practicing CFP professionals make learning easy and effective. Grateful for the constant support from the faculty and coordinators thank you, IMS Proschool!

Online Batch Reviews


Gaurav Sawant

The program gave me valuable insights into fixed income securities, and the placement support was the most valuable part. Sagar Sir made complex topics easy to understand, and Bhavna Ma'am was incredibly helpful during the placement process.




Prerna Sharma

The training program played a key role in helping me secure a job. The practical approach was the most valuable part, and the supportive placement team helped clarify my doubts and provided great opportunities.




Gunn Tilokchadani

Thank you, Proschool, for guiding me through my CFP journey! Grateful to Bhumika Ma'am, Bhavna Ma'am, Ankit Sir, and Sagar Sir for their incredible support and mentorship. Special thanks to the placement team for helping me secure a role at Let's Talk Money Matters!



Srihari KV

I studied CFP at IMS Proschool and had an amazing experience. The knowledgeable faculty, practical approach, and real-life scenarios made me feel fully prepared. Highly recommend it to anyone pursuing CFP!



Faculty

Faculty for the program are experienced professionals with several years of Industry and Consulting experience and remarkable academic backgrounds.



Zeal Doshi
CFP® | CFA® Level I
Personal Finance Trainer



Sagar Thakker
CFP® | CWM

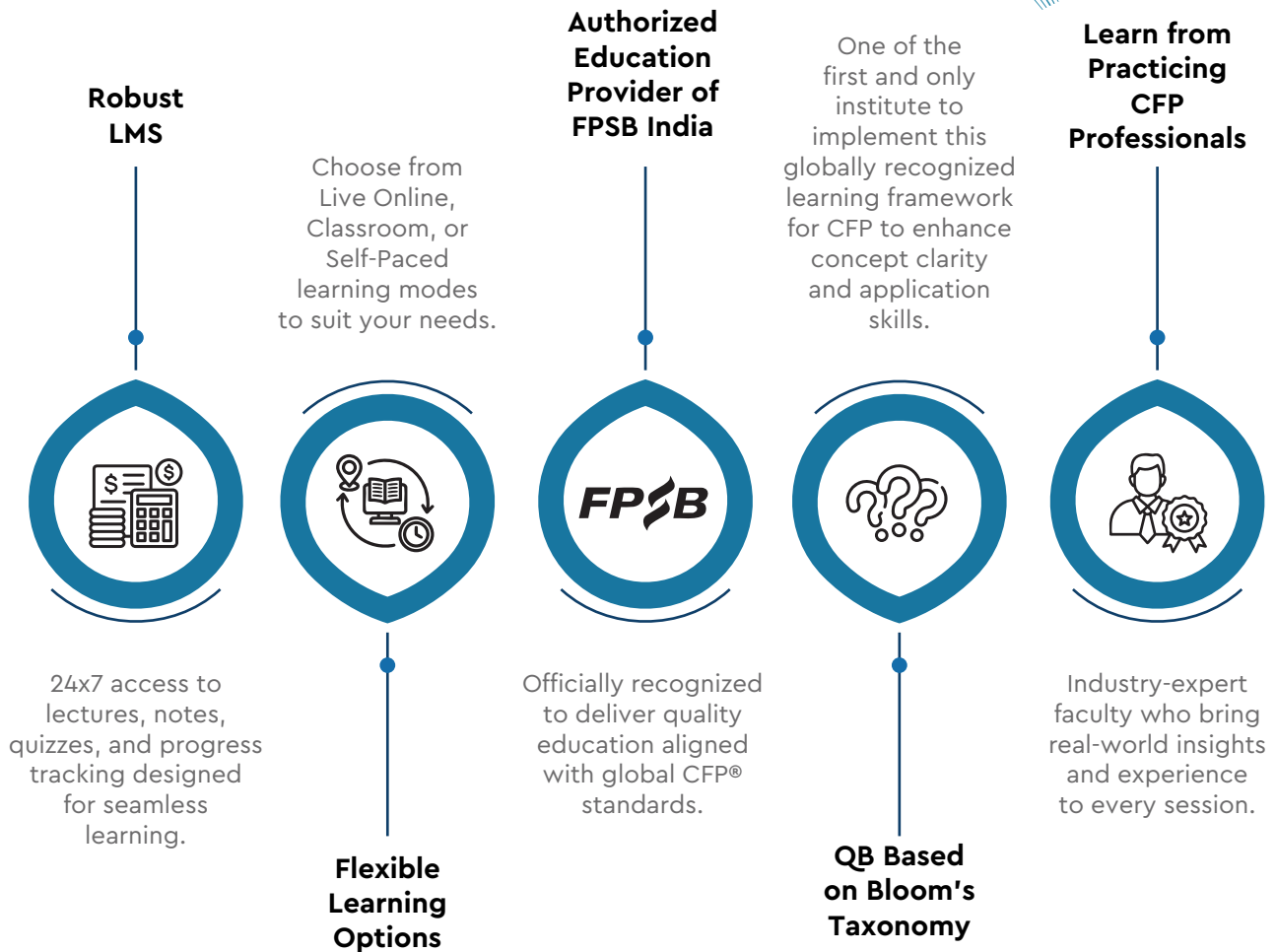


Abhishek Somani
CFP® |
Public Speaking Coach



Ishani Shah
CFP®

Why Proschool?



Our Centers

Mumbai	Delhi	South	Other
Andheri +91 9867958900	Connaught Place +91 7304957442	Chennai +91 9600137479	Kolkata +91 8591956474
Borivali +91 8655701948	Pitampura +91 9136687002	Kochi +91 9645629999	Pune +91 8454988892
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