

proschool

An **IMS** Initiative



CFP[®] CERTIFIED FINANCIAL PLANNER

India's
Leading
Training
Provider

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20,000+
Students

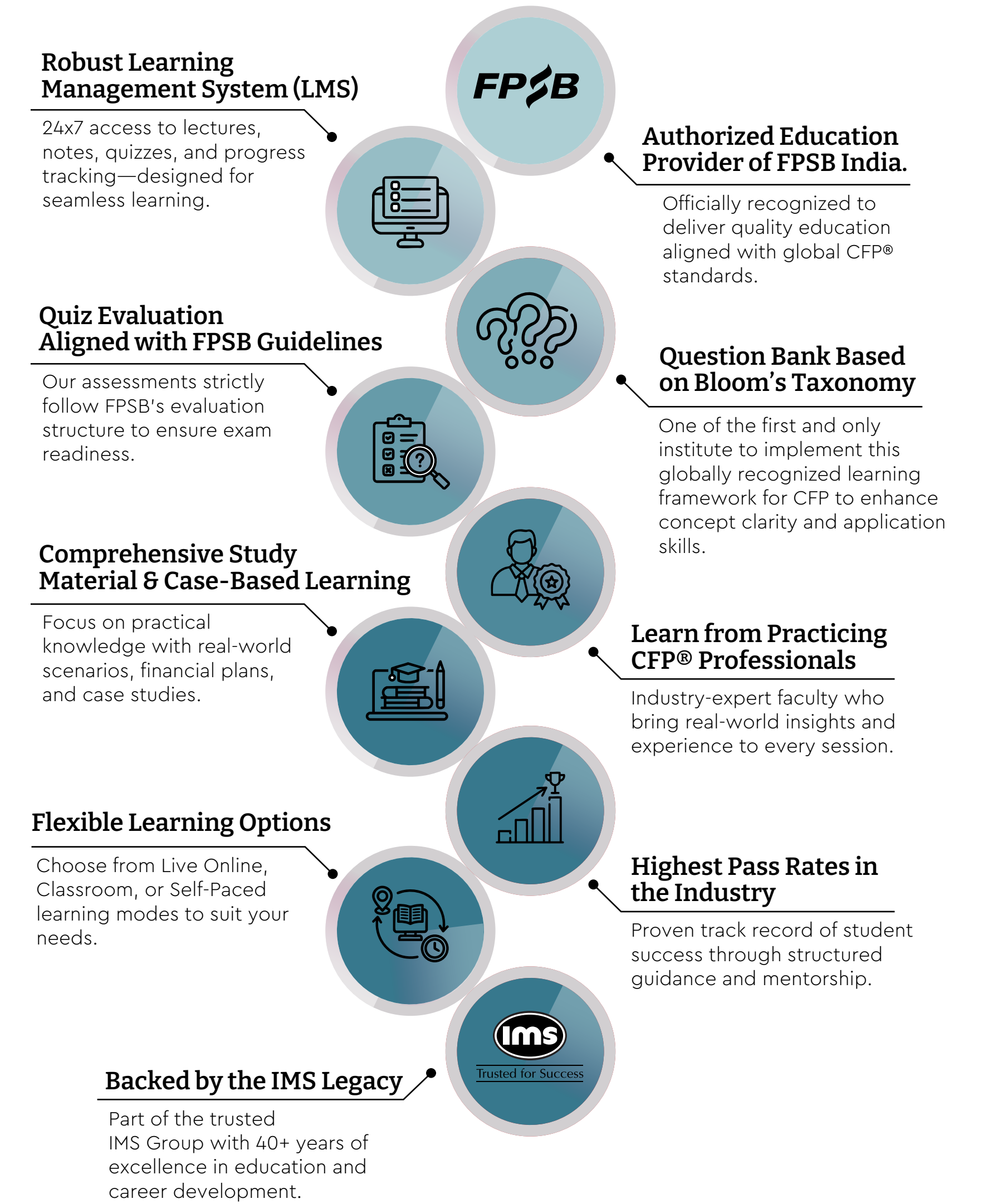
IMS Proschool
Trust the leader

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.

Why IMS Proschool for CFP®?

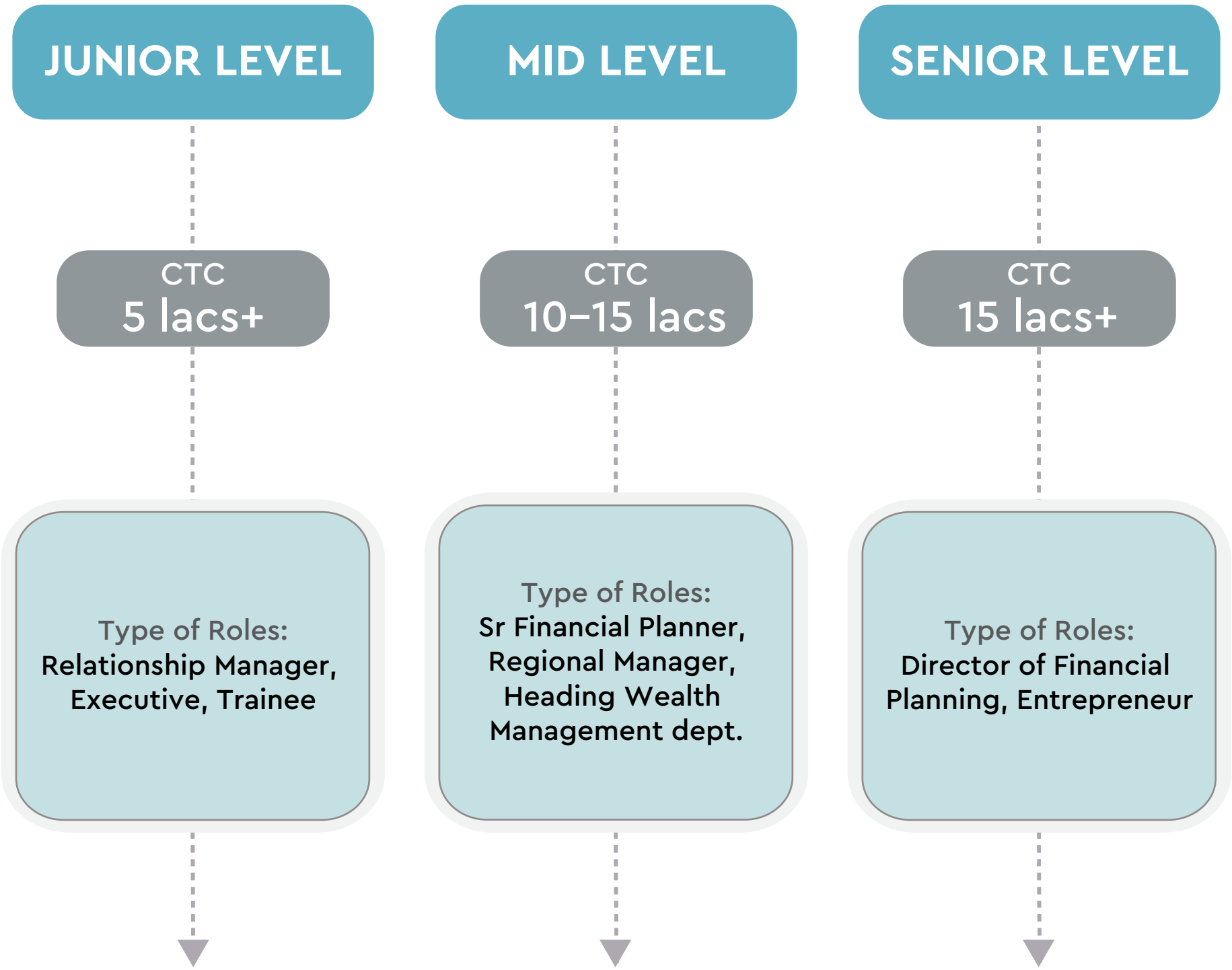


I liked the part where there are various study material provided such as recorded lectures & quizzes to help us better prepare for the upcoming live lecture, where I can raise doubts and get them answered.

- Aryan Tupe



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.



Interview Coordination:

Shortlisted students receive personalized handholding through all interview stages.



Curated Job Opening:

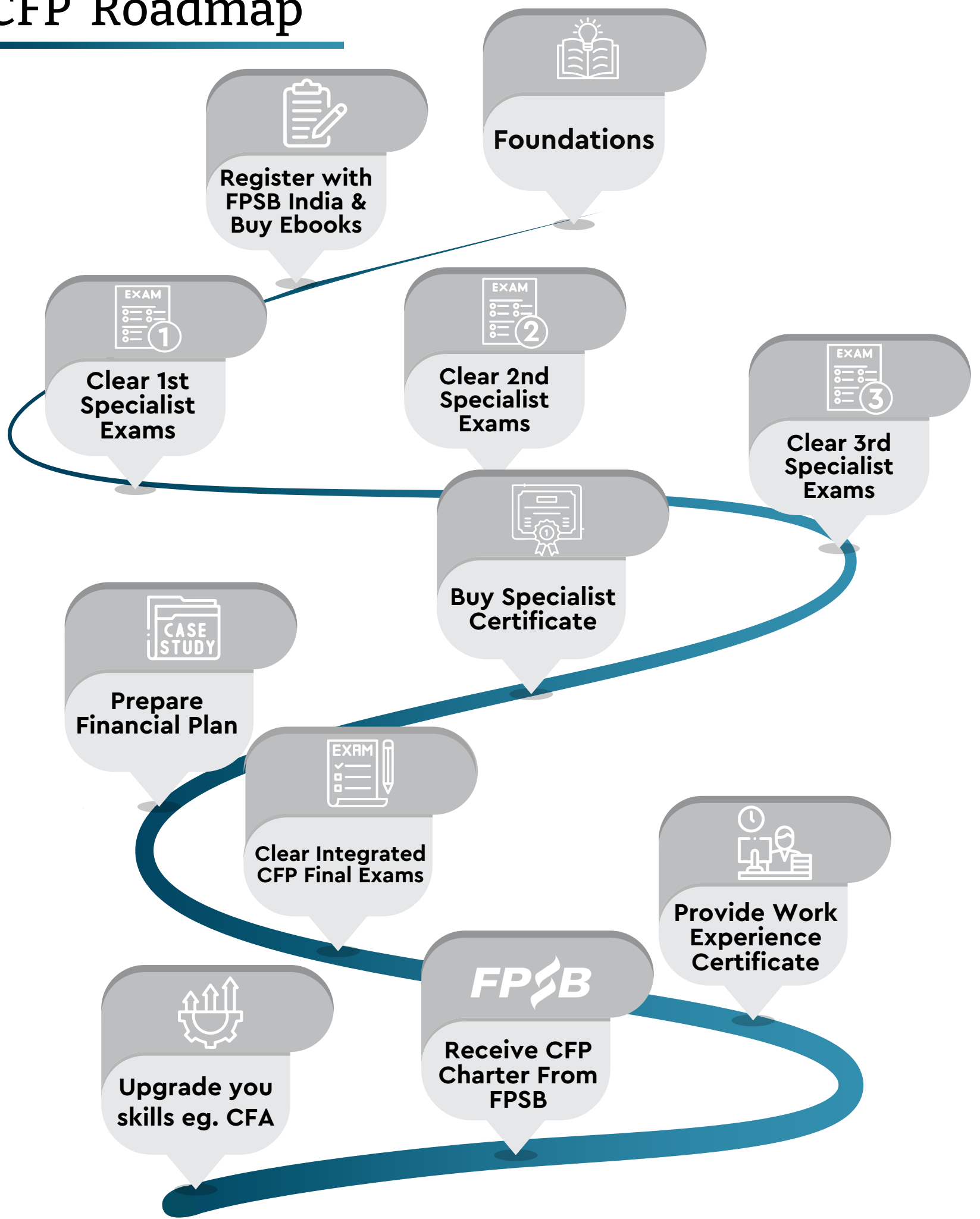
Proschool guarantees at least 5 entry-level job listings that match the course curriculum. Lateral roles are listed on a case to case basis.



Job Assistance

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

CFP® Roadmap



Course Highlights

- High Success Ratio:**
On an average 70% 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.

i
- 100% Placement Assistance:**
IMS Proschool helps every student with 100% Placement assistance on successful completion of the course.

iv



The most appealing thing about Proschool is the study material and the structure does emphasis on mostly practical based approach which makes learning and understanding more efficient.

- Shubham Alurkar



Curriculum

SYLLABUS

Module 0:
Finance Foundation

0.1. Microsoft Excel (Basic to Advance)

- › Excel Functions
- › Pivot Table

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

- › Principals 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® Learning Pathway

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 (6750 x 3)	₹ 20,250
Specialist Certificate	₹ 10,500
Course material IFP 50% Waiver off (IMS Proschool)	₹ 6,500
IFP Exam	₹ 23,500
Total:	₹ 88,500

Above mentioned fees are subject to change.
GST included at the time of application and renewal of Specialist/ CFP Certification.
(IMS Proschool validity 15 Months)

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	₹ 23,500
CFP Certification®	₹ 10,500
Total:	₹ 73,000

Above mentioned fees are subject to change.
GST included at the time of application and renewal of Specialist/ CFP Certification.
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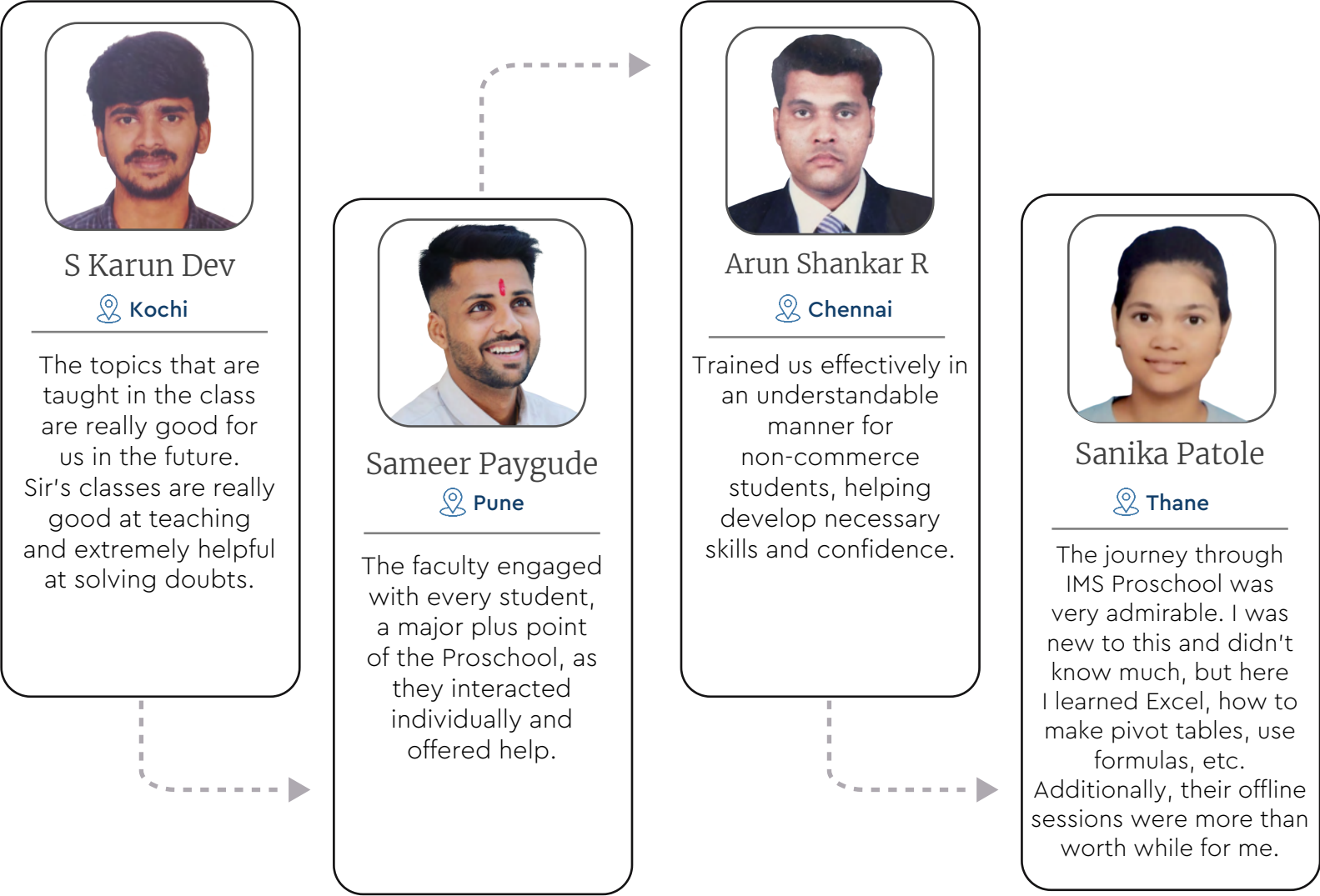


I appreciate the faculty's teaching and online lectures. They also offer placement sessions that provide advice on interview preparation and resume building.

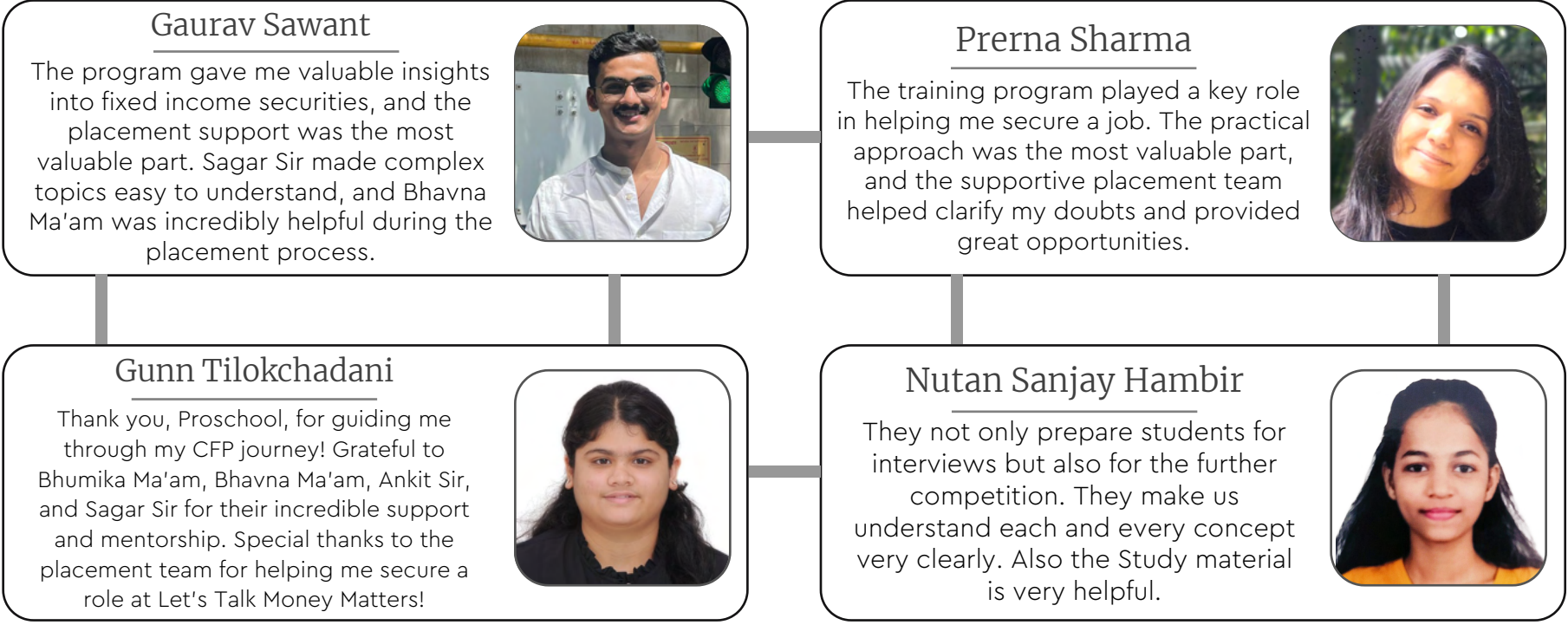
- Rutuja Vaidya



Classroom Batch Reviews



Online Batch Reviews



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?


Pioneering Excellence




Proschool stands at the forefront of finance & accounting education, continuously innovating and setting benchmarks for the industry.

Since 2011, we've equipped over 50,000 professionals and students with cutting-edge skills, propelling them toward success in their careers.

Empowering Thousands




A Proud IMS Legacy




As a vital part of IMS, Proschool draws on decades of educational excellence, blending expertise with a passion for nurturing future leaders.

Our collaborations with leading firms and educational institutions ensure our curriculum remains relevant, practical, and aligned with industry needs.

Strategic Partnerships



Leadership at Its Core



At Proschool, leadership isn't just taught; it's embodied in our approach, inspiring students to reach new heights in their professional journeys

Our Centers

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