

India's Leading Training Provider

Save 50% on FPSB e-Books

IMS Proschool
Trust the leader

Trained 20,000+ Students

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®?

Robust Learning Management System (LMS)

24x7 access to lectures, notes, quizzes, and progress tracking—designed for seamless learning.

Quiz Evaluation Aligned with FPSB Guidelines

Our assessments strictly follow FPSB's evaluation structure to ensure exam readiness.

Comprehensive Study Material & Case-Based Learning

Focus on practical knowledge with real-world scenarios, financial plans, and case studies.

Flexible Learning Options

Choose from Live Online, Classroom, or Self-Paced learning modes to suit your needs.

Backed by the IMS Legacy

Part of the trusted IMS Group with 40+ years of excellence in education and career development.

Authorized Education Provider of FPSB India.

Officially recognized to deliver quality education aligned with global CFP® standards.

Question Bank Based on Bloom's Taxonomy

One of the first and only institute to implement this globally recognized learning framework for CFP to enhance concept clarity and application skills.

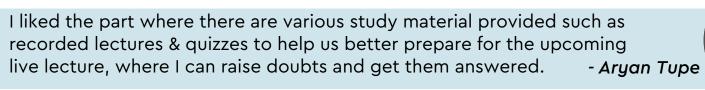
Learn from Practicing CFP® Professionals

Industry-expert faculty who bring real-world insights and experience to every session.

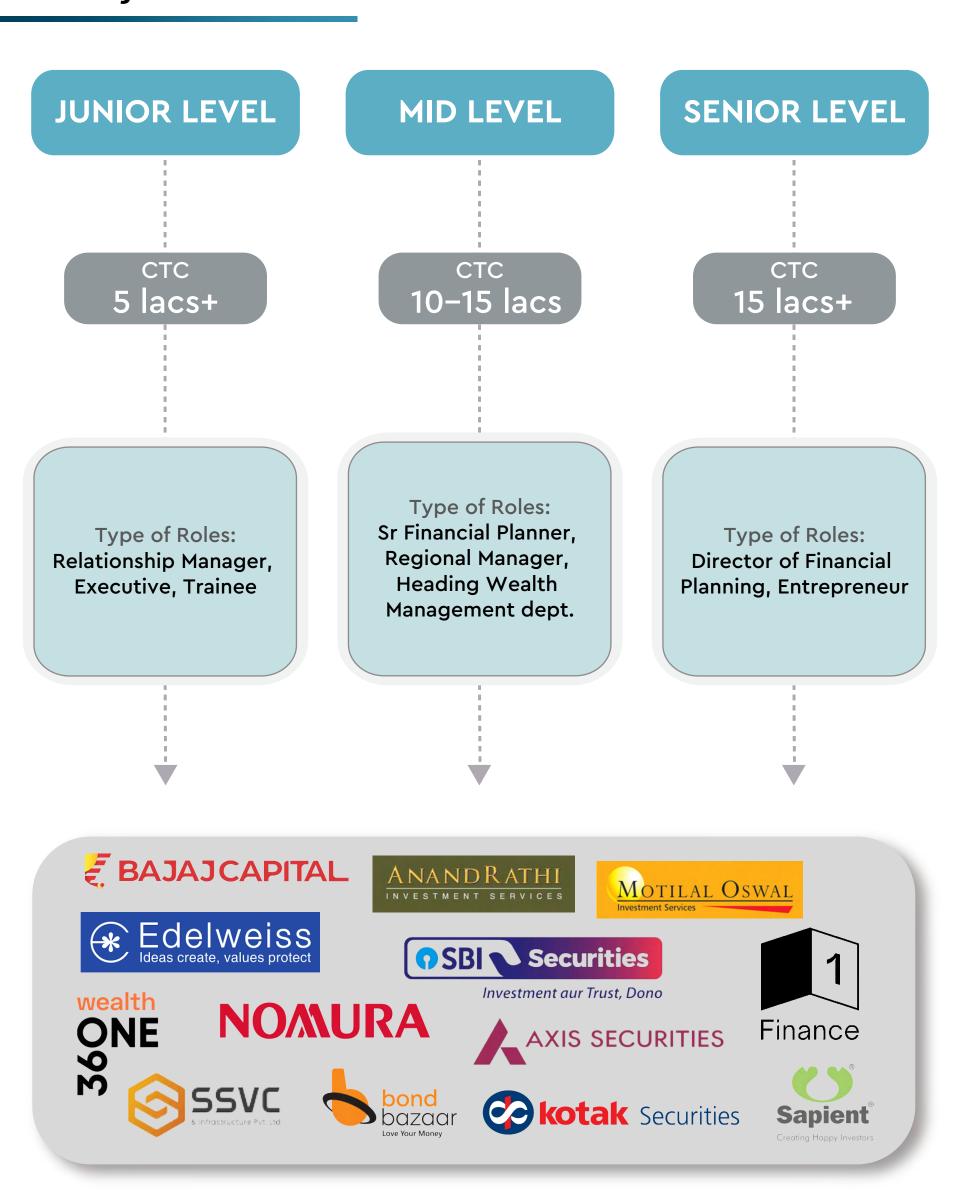
Highest Pass Rates in the Industry

Proven track record of student success through structured guidance and mentorship.





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 entrylevel job listings that match the course curriculum. Lateral roles are listed on a case to case basis.



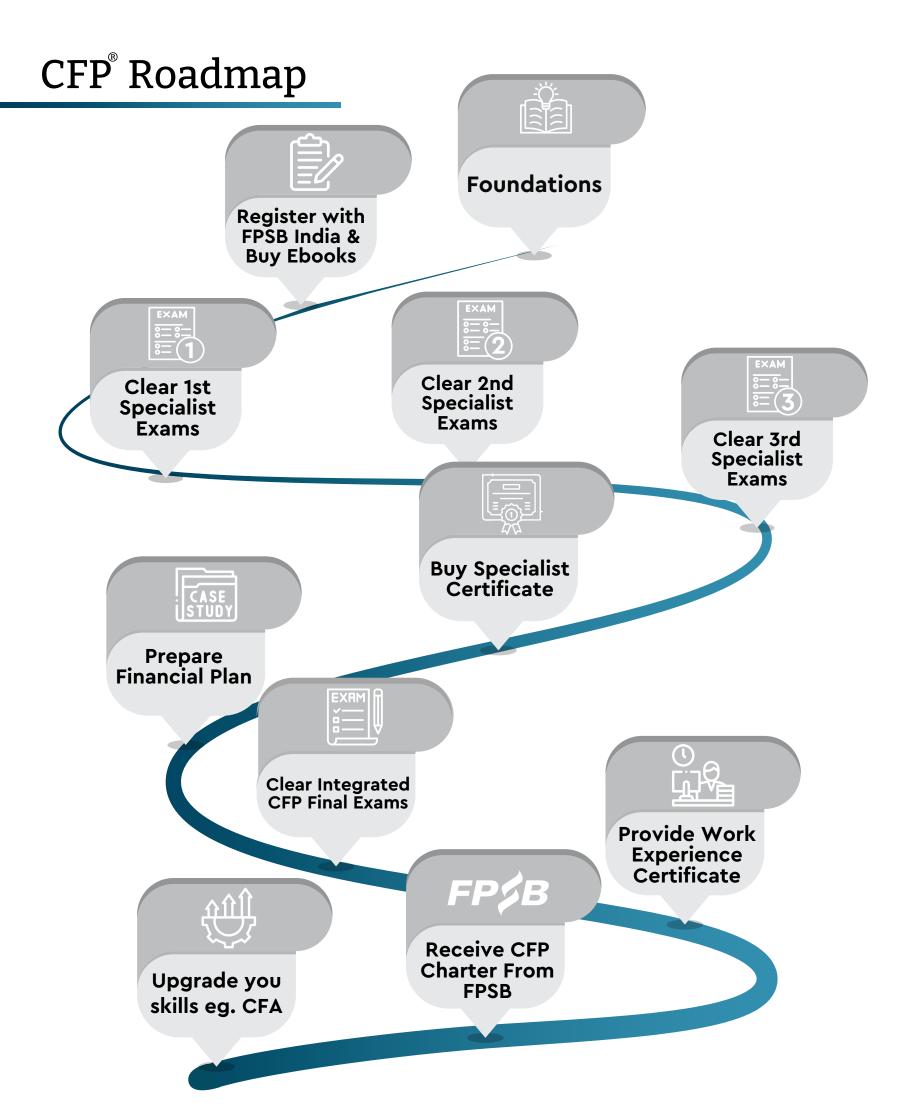
Interview Coordination:

Shortlisted students receive personalized handholding through all interview stages.



Job Assistance

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



Course Highlights

High Success Ratio:

On an average 70% of our candidates pass the CFP Exams.



Expert Faculty:

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



Comprehensive Study Material:

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



100% Placement Assistance:

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





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)

Financial Planning, to acquire the CFP certification.



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



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)

CFP Certification®

Total:





₹10,500

₹73,000

Classroom Batch Reviews



S Karun Dev

The topics that are taught in the class are really good for us in the future.

Sir's classes are really good at teaching and extremely helpful at solving doubts.



Sameer Paygude

© Pune

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



Arun Shankar R

Chennai

Trained us effectively in an understandable manner for non-commerce students, helping develop necessary skills and confidence.



Sanika Patole

Thane

The journey through
IMS Proschool was
very admirable. I was
new to this and didn't
know much, but here
I learned Excel, how to
make pivot tables, use
formulas, etc.
Additionally, their offline
sessions were more than
worth while for me.

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!



Nutan Sanjay Hambir

They not only prepare students for interviews but also for the further competition. They make us understand each and every concept very clearly. Also the Study material is very helpful.



Faculty

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



Zeal Doshi
CFP | CFA® | evel |

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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