

PREMIUM EDUCATION PROVIDER

# CFP<sup>®</sup>

CERTIFIED FINANCIAL  
PLANNER

Industry  
Leading  
CFP<sup>®</sup> Pass  
Percentage

Training for  
CFP<sup>®</sup> since  
2007

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# 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® ?

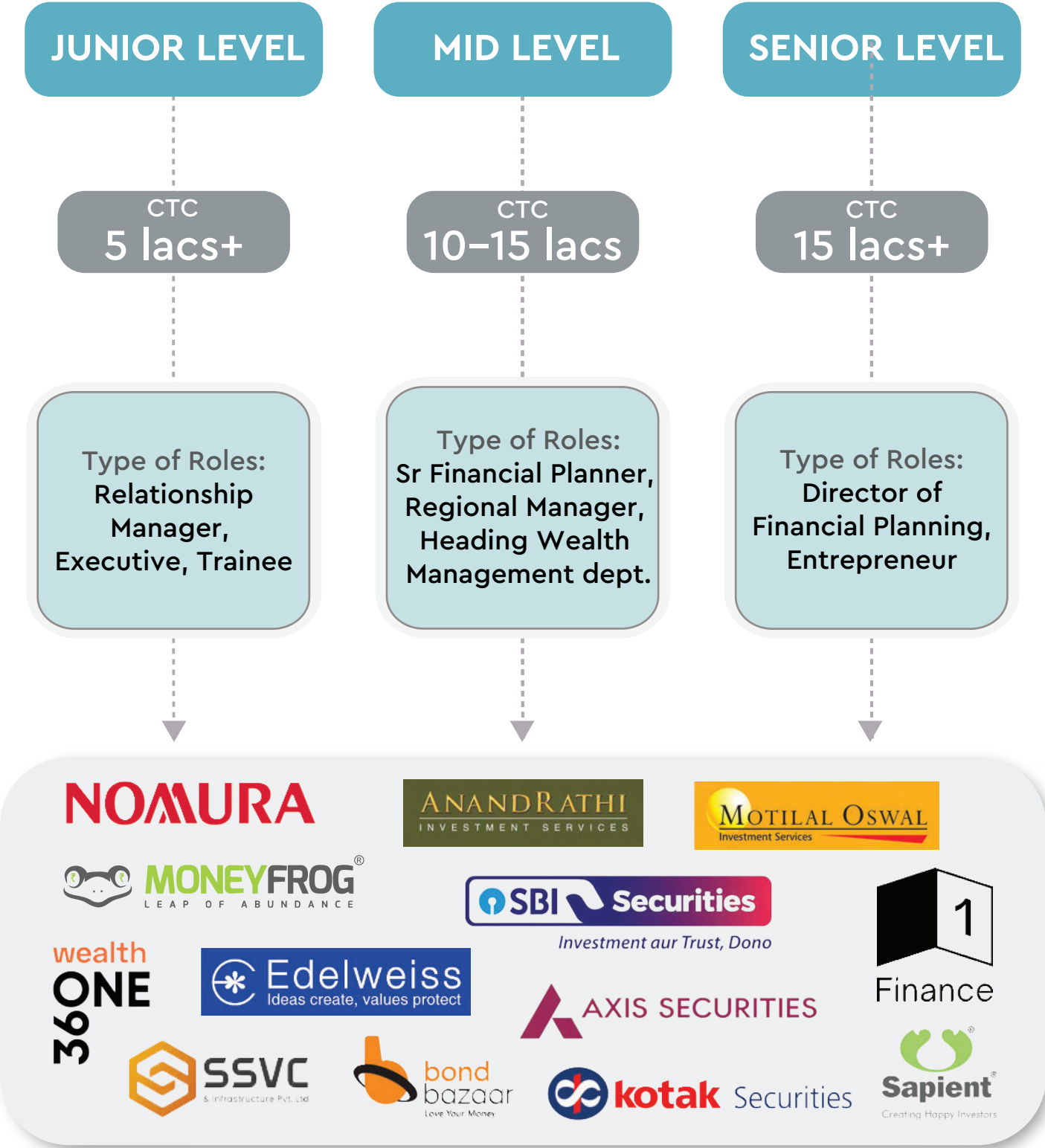


Pursuing the CFP course with IMS Proschool has been a great experience. The structured curriculum, supportive faculty, and regular assessments make learning effective and engaging. Grateful to the team for their guidance!

-Yashita Manghnani



# 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:

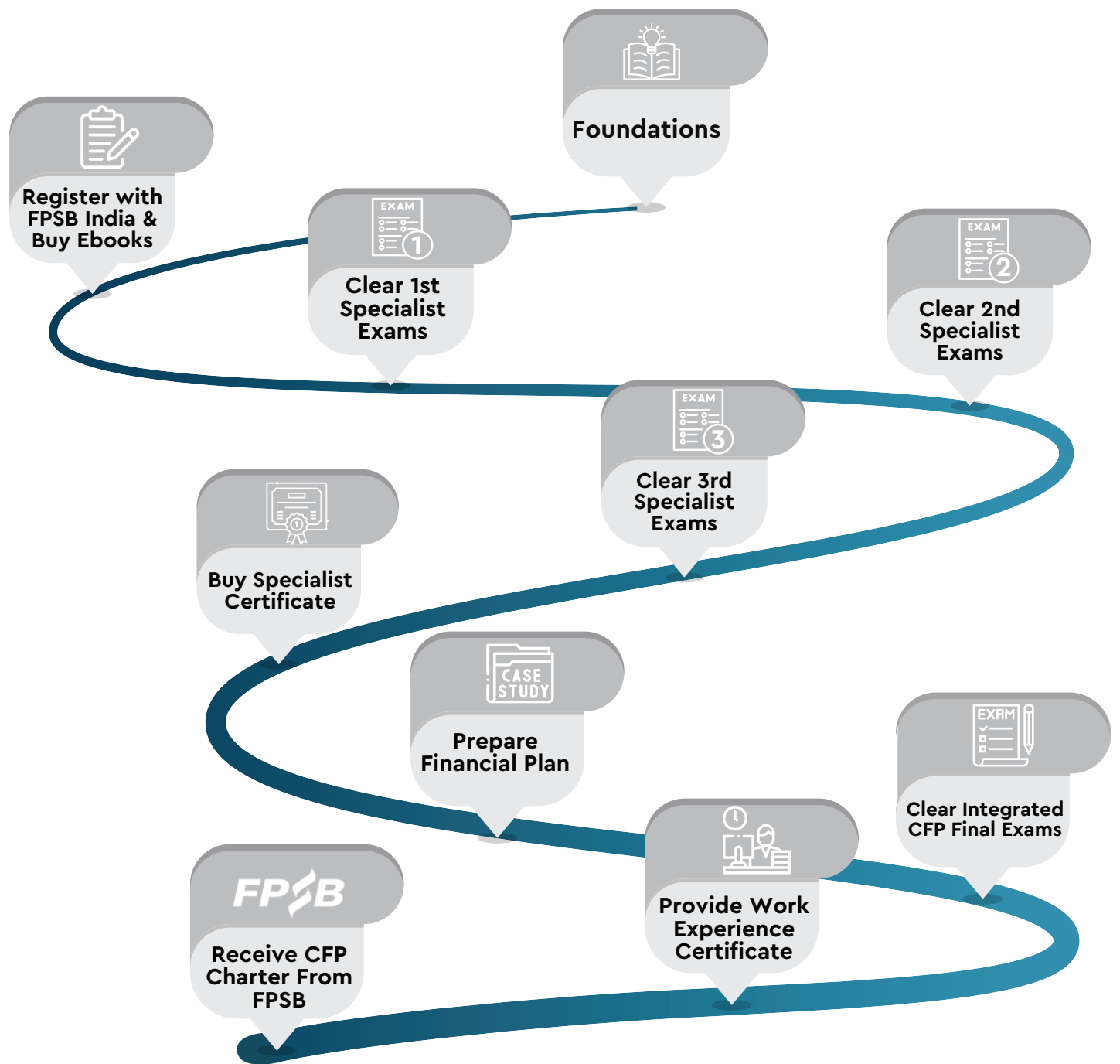
Proschool guarantees at least 5 entry-level job listings that match the course curriculum. Lateral roles are listed on a case to case basis.



### Job Assurance:

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

# CFP<sup>®</sup> Roadmap



## Course Highlights

### High Success Ratio:

On an **Average 80%** 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.



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!

- Srihari KV





**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**
  - › 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

# Why Choose Proschool for CFP®?

Your one-stop solution to clear the CFP® exam and start your own financial planning practice. Guiding you every step of the way with expert training and personalized support.

## Training

### Flexibility



- > Start Anytime
- > Hybrid: Either Classroom or Online

### Faculty



- > CFP® Charterholders
- > Financial Planner Practitioners
- > Real life case studies

### Courseware



- > Summarized Notes
- > Class Recordings + Video Library

### Practice



- > 2000+ strong question bank
- > 10 full length mock
- > 10+ case studies
- > Question bank aligned with FPSB evaluation matrix (Bloom taxonomy)

### Revision



- > For every monthly exam
- > Exam strategies

## Support

### Finance Foundation



- > Basics of Finance and Excel to ease into CFP course

### Registration Support



- > FPSB registration Support
- > Exam booking Assistance

### Fee Waivers



- > Discounts on Material

### Doubt Resolution



- > Support from faculty & peers
- > Continuous academic handholding

### Personalized Tracking



- > Custom study plans
- > Regular progress monitoring
- > 1:1 Guidance by Mentor

### Complete Exam Support



- > Test reminders & Revision tracking

## Professional

### Credit-Based Certification



- > 3 academic credits included
- > Option to earn 12 more credits
- > Use credits toward MBA/PG

### Global Qualification



- > Recognized in 28+ countries
- > Valued by MNCs, Big 4s & Indian firm

### Placements



- > Internship and job assistance to interested candidates
- > Resume building and mock interviews

### Skills Modules\* (optional)



- > Upgrade your Practical Skills to stay industry relevant
- > Financial Modeling
- > PowerBi

(\*separate fee payable)



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!

- Gunn Tilokchadani



# CFP® 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 (8000 x 3)	₹24,000
Specialist Certificate	₹10,500
Course material IFP 50% Waiver off (IMS Proschool)	₹6,500
IFP Exam	₹25,000
<b>Total:</b>	<b>₹ 93,750</b>

### 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 Certificate	₹10,500
<b>Total:</b>	<b>₹ 74,500</b>

# 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 2  
Founder - Zenith Finserv



**Sagar Thakker**  
CFP® | CWM  
Founder - Kritha Finserv

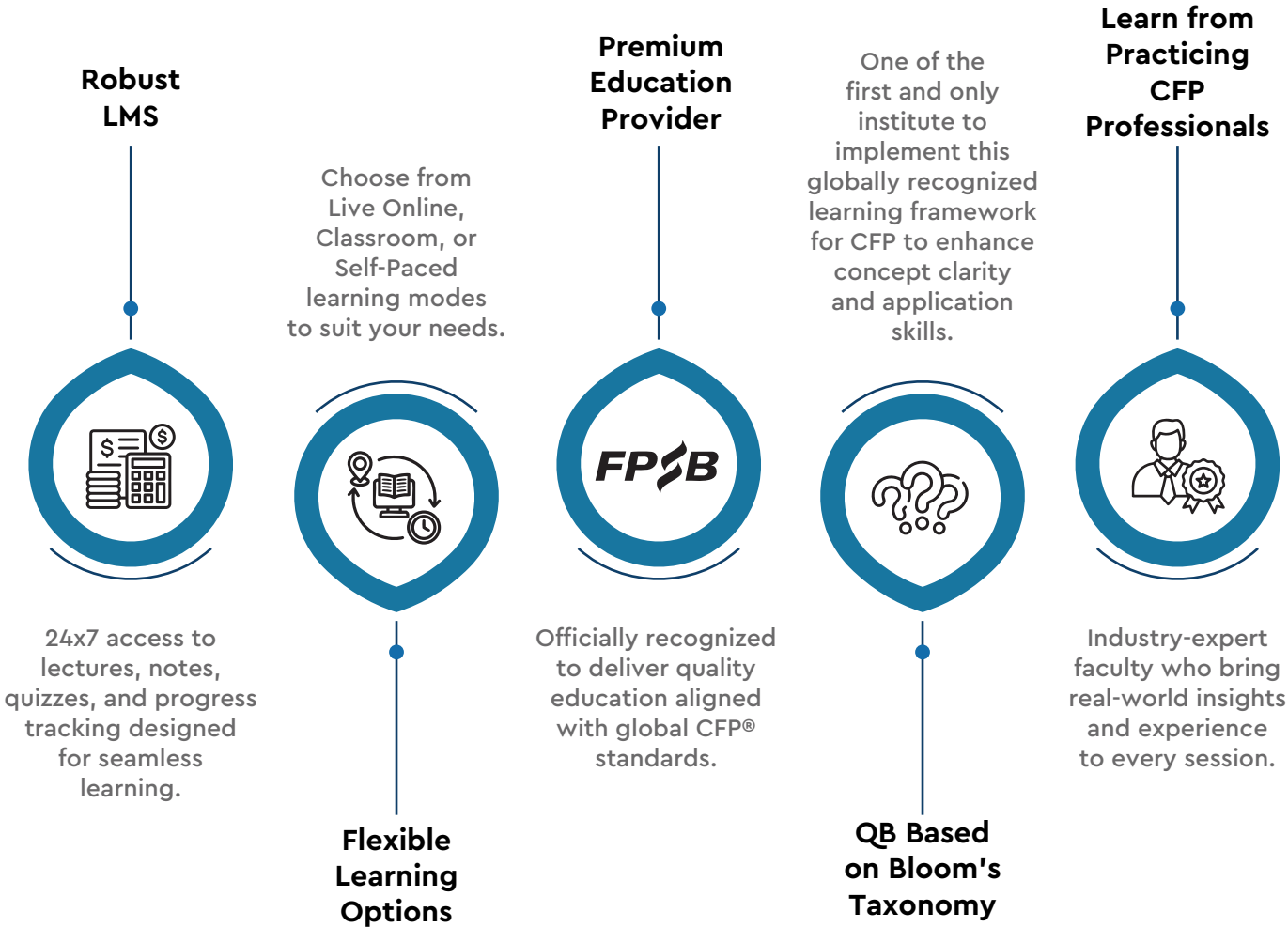


**Abhishek Somani**  
CFP® | Public Speaking Coach  
Visiting Professor - FLAME University



**Ishani Shah**  
CFP®  
Founder - Core Investment

# 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
Thane +91 9867842800	Gurgaon +91 7738674974	Hyderabad +91 9136908879	Lucknow +91 7389180009
Navi Mumbai +91 9867842800	Noida +91 9136687679	Bengaluru +91 7892295842 +91 9731566129	Ahmedabad +91 7718865564

Online: +91 9867994700