

proschool

An  Initiative



PREMIUM EDUCATION PROVIDER

CFP[®]

**CERTIFIED FINANCIAL
PLANNER**

**Industry
Leading
CFP[®] Pass
Percentage**

**Training for
CFP[®] since
2007**

**ProInsight:
Your Personal
Mistake
Analyser**

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

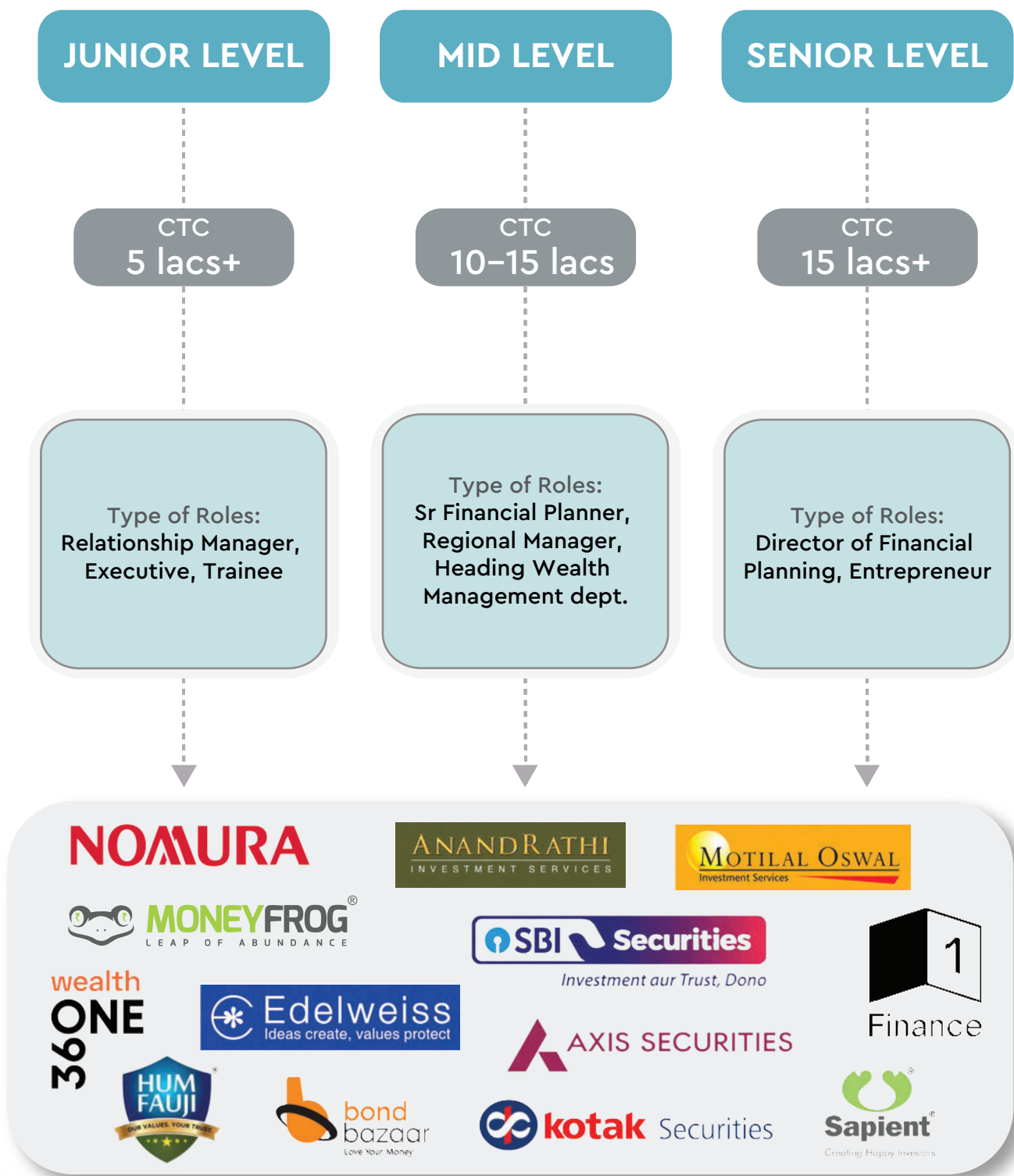


I am currently pursuing the CFP program at IMS Proschool, and my experience has been excellent. The well-structured study material has helped improve my knowledge and confidence in financial planning.

- Prachi Jain



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:

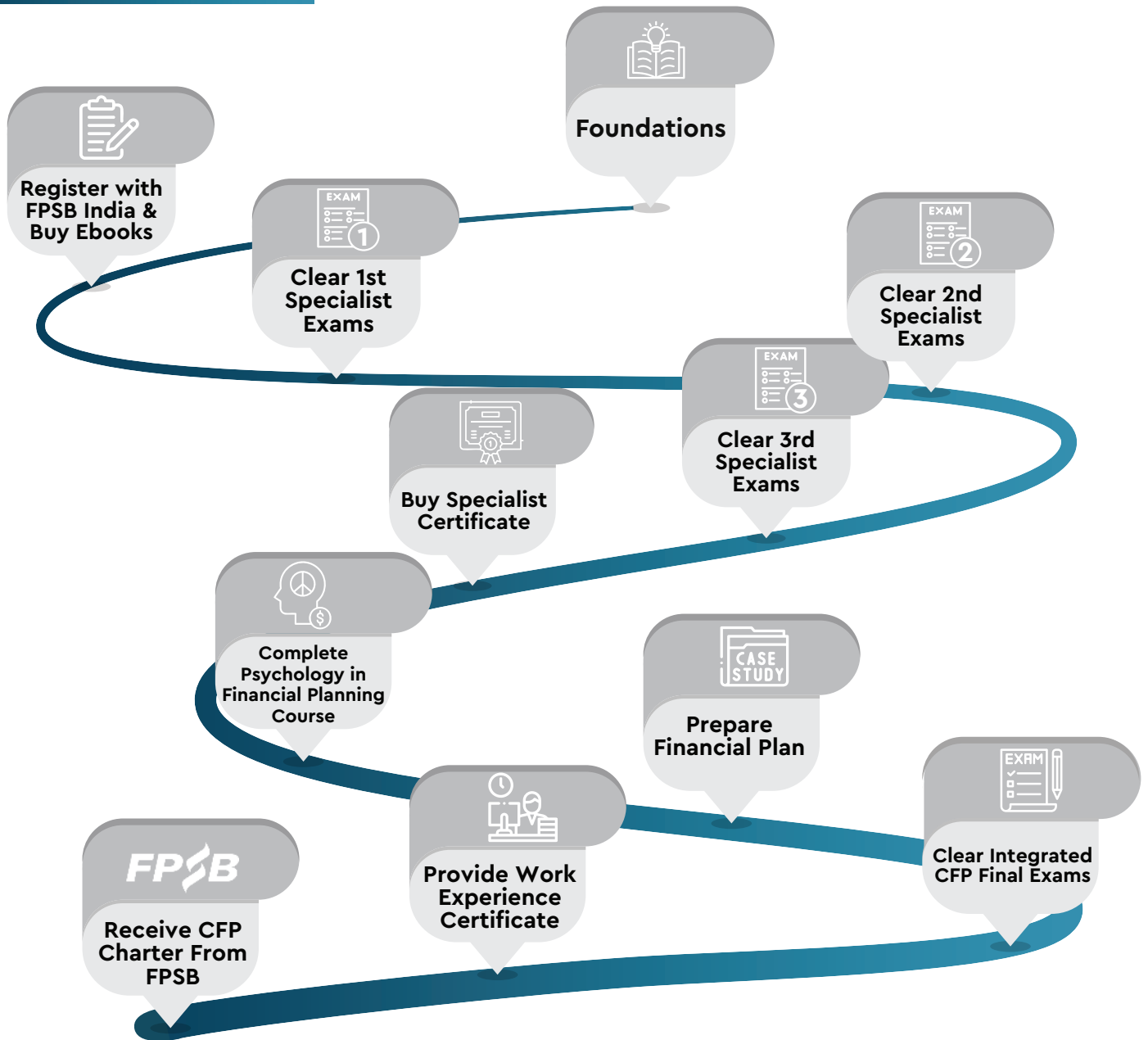
Shortlisted students receive personalized handholding through all interview stages.



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



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



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

- › 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®?



Turn every mistake into your most powerful learning moment

Personalised AI feedback that Identifies exactly where your logic failed and generates custom practice questions to fix them instantly.



When you get an answer wrong

Misconception Analysis

Pinpoints exactly where your reasoning failed and exactly when your logic went off track.

Revision Notes

Creates tailored notes on exactly what you struggled with, based on your syllabus not generic summaries.

Practice Questions

Delivers targeted questions on weak areas ramping up difficulty to test true exam readiness.

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 aligned with FPSB evaluation matrix (Bloom Taxonomy)
- > 10 full length mock tests
- > 10+ case studies

Revision

- > For every exam
- > Exam strategies
- > **pro insights***
- > **AI Tutor***

SUPPORT

Finance Foundation

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

Registration Support

- > FPSB registration Support
- > Exam booking Assistance

Doubt Resolution

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

Personalized Tracking

- > Custom study plans
- > Regular progress monitoring
- > 1:1 Guidance by Mentor
- > Test reminders & Revision tracking

PROFESSIONAL

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
- > Earn 15 academic credits

(*separate fee payable)

CFP® Pathway

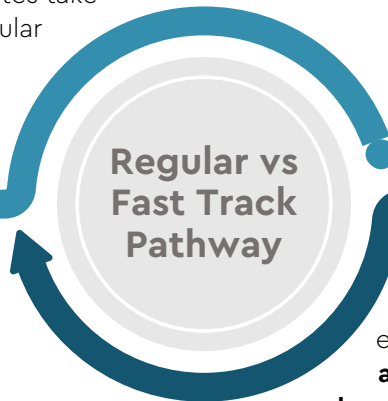
FPSB, offers two different pathways to pursue the Certified Financial Planner Certification

PUPOSE	ACTUAL AMOUNT	PROSCHOOL DISCOUNT	FINAL AMOUNT
FPSB Registration	18,000	-	18,000
Course material (IPS)	7,500	2,475	5,025
Specialist Exam IPS	8,000	-	8,000
Course material (RTPS)	7,500	2,475	5,025
Specialist Exam RTPS	8,000	-	8,000
Course material (REPS)	7,500	2,475	5,025
Specialist Exam REPS	8,000	-	8,000
Specialist Certification (mandatory before purchasing the IFP Course)	11,000	-	11,000
Course material (IFP)	15,000	6,000	9,000
Psychology Course	5,000	-	5,000
Financial Plan Assessment + CFP Exam (bundled price)	25,000	-	25,000
FPSB Fees	1,20,500	13,425	1,07,075



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.



PUPOSE	Final Amount
Document Verification	5,000
BUNDLED PRICE FPSB Registration (Subject to Approval) + Full Course material (IPS/RTPS/REPS/IFP)	38,000
Psychology Course	5,000
BUNDLED PRICE Financial Plan Assessment + CFP® Exam	25,000
FPSB Fees	73,000

Note: IMS Proschool fees are separate and payable in addition to FPSB India fees.

Faculty

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



Kartik Zibbu
CFP® | CWM | CMA US



Sagar Thakker
CFP® | CWM
Founder - Kriha Finserv

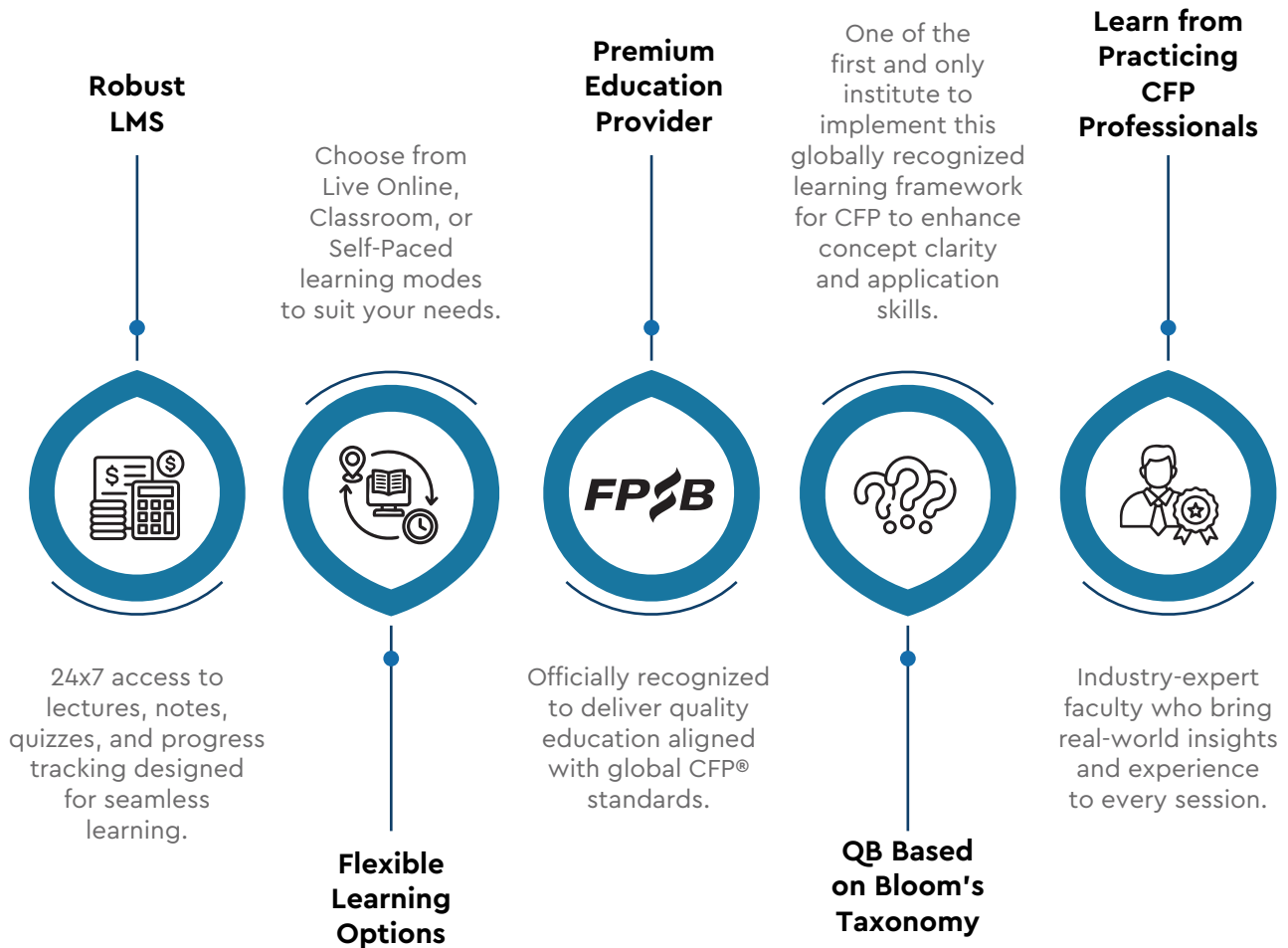


Abhishek Somani
CFP® | Public Speaking Coach
Visiting Professor - FLAME University



Ishani Shah
CFP®
Founder - Core Investment

Why Proschool?



Our Centers

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	Navi Mumbai +91 9867842800	Pune +91 8454988892	Ahmedabad +91 7718865564	Surat +91 8655985508
North/ East	Noida +91 9136687679	Pitampura, Delhi +91 9136687002	Gurgaon +91 7738674974	Connaught Place, Delhi +91 7304957442
	Kolkata +91 8591956474	Lucknow +91 7389180009		
South	Chennai +91 9600137479	Kochi +91 9645629999	Hyderabad +91 9136908879	Bengaluru +91 7892295842 +91 9731566129

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