



India's leading training provider for CFP^{CM} Certification

**More than 400 CFP Certified professionals in India are from IMS
Proschool**

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About Certified Financial Planning (CFP^{CM})

- ❑ Certified Financial Planner Certification is an internationally accepted Financial Planning qualification.
- ❑ The qualification is recognized in more than 20 countries across the world. In India, the Certification is granted by Financial Planning Standards Board - India (FPSB).
- ❑ The qualification gears candidates to provide comprehensive financial advisory services to individuals. It covers insurance, retirement planning, investment, taxation and estate planning.
- ❑ For those looking for a career in the financial services sector, CFPCM Certification provides a definite edge over other candidates. One's expertise and credibility as a qualified professional is instantly communicated if he/she has a CFPCM Certification

Benefits of CFP^{CM}

- ❑ Boosts your advisory because CFP^{CM} certification would communicate your knowledge, skill set and expertise.
- ❑ Increased your chances of getting employed at Wealth Management, Financial Planning firm, Banks, Mutual Fund
- ❑ Only International qualification In the field of Financial Planning & Wealth Management.
- ❑ Helps you align your practice on globally recognized standards and process.
- ❑ Widens the scope of services provided by you. You become one point of contact for your client for all financial service requirements.



Huge Demand Supply gap for CFP^{CM} Professionals in India

❑ India has 2,500+ CFP Certificants for a population of 1200 million

Versus

❑ 60,634 CFP Certificants in US (250 million Population)

❑ 17,234 CFP Certificants in Canada (60 million population)

❑ 16,434 in Japan (120 million population)

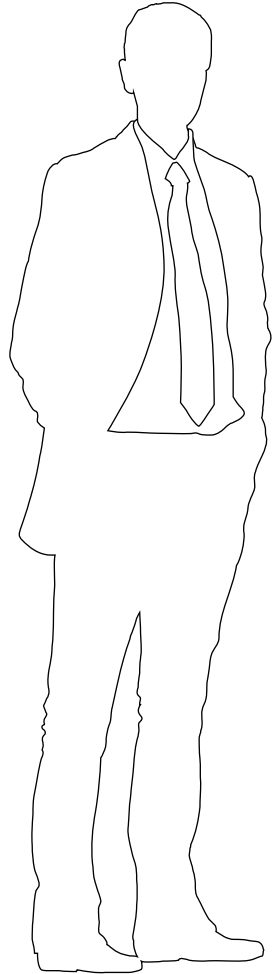
Against other Financial Services Intermediaries in India

❑ 20 Lakh+ Life Insurance Agents

❑ 50,000+ Mutual Fund Advisors

❑ 25,000 + Bank Branches , 5,000+ Insurance Services Branches and 10000+ Brokerages Service Branches

Where will a CFP^{CM} find opportunity?



Private
Banking

Insurance

Fund
Management

Mutual Fund

Financial
Advisor

Relationship
Manager

Wealth
Manager

Investment
Consultancy

Stock Broking

Portfolio
Management

Estate
Planning

Financial
Product
Designing

Charter Members of FPSB India have resolved that they will give first preference to CFP^{CM} Certificants in recruitment



Career Prospects for CFP^{CM} Certificates'



Job Opportunities

- Financial Planning is becoming an integral part of Wealth Management in India.
- Banks and Wealth Management firms are employing Financial Planners to provide value added services and advisory to their clients.
- In the emerging regulatory scenario, knowledge based ethical advisory as espoused by CFP^{CM} certification is being looked upon as a preferred professional qualification

International Business

- CFP Certification is a globally accepted professional qualification in Financial Planning
- CFP Certification has cross-border use where a foreign affiliate recognizes a candidate's accreditation in one's own territory.
- The globally accepted curriculum of CFP Certification opens up huge international opportunity in an increasingly borderless global environment

Self Employment

- The varied knowledge base that CFP^{CM} Certification imparts, enables an Advisor to offer advice on multiple asset classes thus increasing the share of his wallet.
- The varied knowledge base that CFP^{CM} Certification imparts, empowers a Certificant to launch into a career of one's own.
- CFP^{CM} Certification provides various platforms for practitioners to professional network and explore opportunities in Financial Services.

Career Path of a Financial Planner

	Entry Level	Mid Level	Senior Level
Types of Roles	Relationship Manager, Trainees & Executives at Banks	Sr.Financial planner, Regional or Zonal Manager, Heading Wealth Management Dept.	Director of financial planning, entrepreneur
Experience	0 - 3 years	4 - 8 years	10+ years
How to get there?	Bachelor's degree in commerce, finance & accounting Mutual Fund Certificate & IRDA Certificate, Analytical skills & good communication skills, Basic knowledge of Microsoft Excel & Word	All entry-level requirements Certified Financial Planner (CFP) MBA in Marketing/Finance Excellent interpersonal skills	All mid-level requirement Ability to form strong client relationships
Salary*	Rs.2 to 5 lac	Rs.5 to 10 lac	Above Rs.10 lac
Description	Explain clients about product information. Use computers and software to enter and analyze financial data Support senior financial planners	Interview clients to determine financial status and goals Manage client relationships Clearly communicate complex financial concepts	Develop and deliver financial planning seminars to clients and prospective clients Coordinate legal, tax, investment, estate and insurances perspectives Prepare and monitor comprehensive financial plans

Requirements for CFP^{CM} Certification

One needs to fulfill the following four criteria to obtain the CFP^{CM} Certification:

Examination: The candidate has to pass the CFP^{CM} certification exam i.e. she/he has to clear all the five papers viz. Risk Management & Insurance Planning, Retirement Planning & Employee Benefits, Investment Planning, Tax Planning & Estate Planning and Advanced Financial Planning.

Education: Candidate must be at least a 12th Std Pass/Equivalent.

Experience: The candidate has to complete 3 years of work experience either pre or post Certification exam in case he/she is a graduate. In case of non graduates the criteria is 6 years of work experience.

Ethics On completion of the education, examination and experience requirements, the candidate has to sign declaration for adherence to FPSB India's Code of Ethics & Rules of Professional Conduct

Course Outline

**Introduction to
Financial Planning**

**Risk Analysis and
Insurance
Planning**

**Retirement
Planning and
Employee
Benefits**

**Investment
Planning**

**Tax Planning and
Estate Planning**

Pathway to CFP^{CM} Certification

1. Regular Pathway – to accomplish the ‘Education’ criterion. Enroll with IMS Proschool

2. Challenge Status Pathway for working Professional :

Requires additional higher qualification or professional qualification as specified by FPSB India apart from Graduation degree

Requires a minimum of 3 years’ work experience in Institutions/Banks or 5 years’ experience in Financial Services Industry as self employed or in finance related departments of other Industries

Challenge Status Pathway

Regular Pathway

Number of Exams

Only one online Examination – Advanced Financial Planning.

Five Examinations : 1 To 5

Curriculum Fees

Registration Fees

For Charter Members: 15,795/-
For Non-Charter Members: 29,955/-

Registration fees

16385/-

Examination Fees

7,080/-

Examination Fees

1-4 exams: 3,540/-
5th Exam: 7,080/-

Education Requirements

1. Chartered Accountant (CA) from Institute of Chartered Accountants of India (ICAI)
2. Chartered Financial Analyst (CFA) from CFA Institute, USA
3. Cost Accountant (ICWA) from the Institute of Cost and Works Accountants of India (ICWAI)
4. PhD./ M.Phil / Post Graduate in Economics, Econometrics, Statistics, Commerce, Mathematics, Finance
5. Post Graduate in Economics, Econometrics, Statistics, Commerce, Mathematics, Finance, Management, Financial Planning/ Advising, Investment (or any other similar discipline)
6. LLB (Law) or equivalent
7. Licentiate/Associate/ Fellowship of Life Insurance from Insurance Institute of India
8. Actuary from Institute of Actuaries of India
9. Civil Service Examinations by Union Public Service Commission (UPSC)
10. Company Secretary from Institute of Company Secretaries of India (ICSI).
11. Fellow, Financial Services Institute (FFSI) / Fellow, Life Management Institute (FLMI) from LOMA

Tenth class or equivalent.

Examinations can be taken after the 2 months of registration for the Education Program, offered by FPSB India's Authorized Education Provider.

	Challenge Status (Charter Members)			Regular Pathway
Experience Requirements	S. No	Employment Background	Number of years Work Experience	Experience certificate can be provided after completing the CFP ^{CM} Certification Education Program.
	1.	Job In Financial Institution	3 years	
	2.	Self Employed	3 years	
	3.	Others	5 years	
Frequency of Exams	Only 5 th Exam required to clear CFP ^{CM} certification program which is held daily.			Have to attempt five Exams i.e. Exam1-5 which are held on daily basis.
Exam Pattern	Duration : 4 hrs Mark: 100 Questions: 30 -32 questions from two case studies Question Type: Multiple choice questions Marking: No negative marking Passing: Below 50%: Fail 50% -60%: C 60 -70% B 70% & above A			Duration : 2 hrs Mark: 150 Question Type: Multiple choice questions Marking: No negative marking Passing: Below 50%: Fail 50% -60%: C 60 - 75% B Above 75% - A

Study Mode (Challenge Status & Regular way)



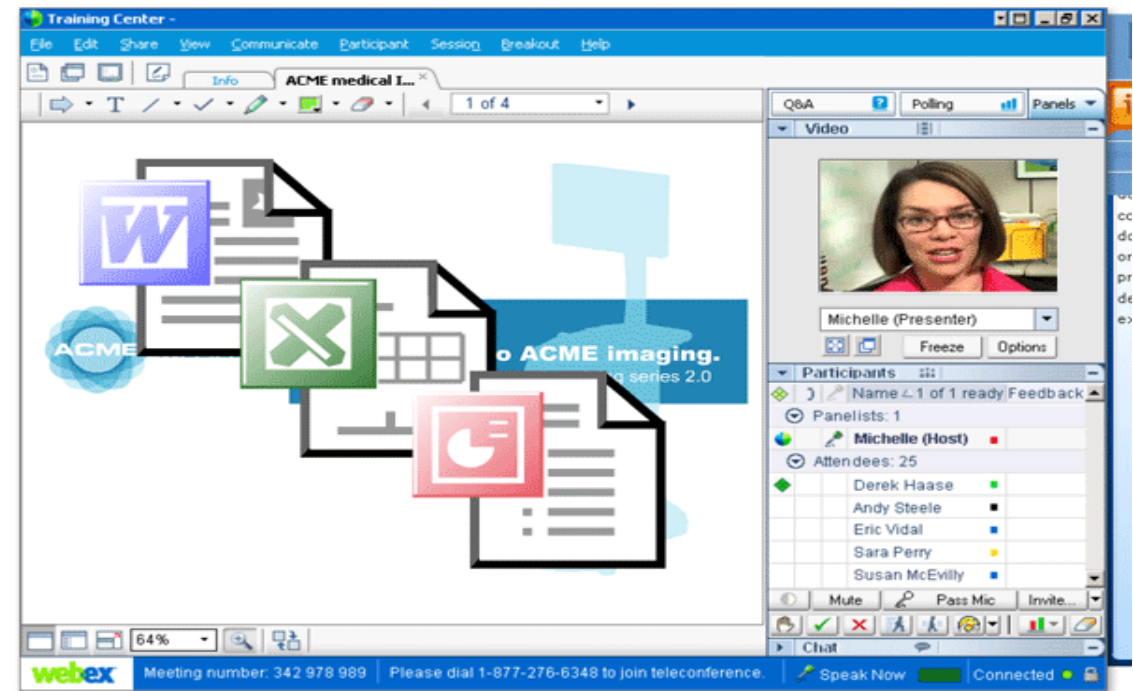
1. Live Virtual Classroom:

- ❑ **Live Virtual Classroom:** Get live and interactive classroom training from our expert CFP faculty through internet which helps you to prepare for the exam at the comfort of your home (Total 70 hrs training)
- ❑ **Excel based Training:** Excel based training. Helpful in solving critical problem quickly and making Financial Plan for Client.
- ❑ **Excellent Study material:** IMS Proschool updates its CFP Study material every year and abreast all the changes come in the exam.
- ❑ **Recorded Classroom:** If you miss any of the lecture then get recorded classroom and you can use them for future reference also.
- ❑ **Question & Answer Forum:** Get your doubt solved by our expert faculty within 24 hours.
- ❑ **Simulated test paper:** Question bank of over 3000 questions & 20 case studies prepare you for the exam & simulated test paper helps you to check your prep before the exam
- ❑ **Online Study Material:** E-learning Material with Mobile app for easy access of material.

What is Live Virtual Classroom

IMS in partnership with CISCO offers you the best learning platform though Live Virtual Classroom. All you need is internet connection , head phone & mike. Benefits are:

- ❑ Live & interactive sessions
- ❑ Attend session at your home
- ❑ Get training from best Faculty in the industry
- ❑ Get experience of real time Classroom
- ❑ Get recorded videos of all sessions
- ❑ Interact with peers while learning
- ❑ No travel, save time - Study in the comfort of your home with a broadband connectivity



2. Distance Learning Study material

- ❑ **Hardcopy:** Get descriptive text books for each module (excluding AFP)
- ❑ **Online Study Material:** E-learning material with mock assesement
- ❑ **Mobile App:** Access all the material at you ease from anywhere
- ❑ **Excellent Study material:** IMS Proschool updates its CFP Study material every year and abreast all the changes come in the exam.
- ❑ **Question & Answer Forum:** Get your doubt solved by our expert faculty within 24 hours.
- ❑ **Simulated test paper:** Question bank of over 3000 questions & 20 case studies prepare you for the exam & simulated test paper helps you to check your prep before the exam
- ❑ **Videos** on all excel calculations

Registering for the CFP Program

- ❑ Register at IMS Proschool for Study Support
- ❑ Register at FPSB India for CFP registration
(See FAQs at Website)
- ❑ Register with NSE India for Final Exam
(See FAQs at Website)



Fee Structure (Inclusive all)

Program	Fee (RS.)
Live Virtual Classroom	15,000/-
Distance Learning	6,000/-

Testimonials of IMS Proschool Students

Wanted to take this opportunity to thank the entire faculty of IMS for making learning a wonderful experience. I am running a full time business and am in the field of Financial Advisory & broking, but still I must admit that had it not been for the Live Virtual Classroom , IMS I might not have cleared the Challenge status exam in one shot.

The Live Virtual Classroom were really helpful as the faculty had picked up the most relevant and the most interesting parts of the topics and then discussed it in depth. After attending these sessions a mere reading of the course material is more than enough to reinforce the concepts learned. I would strongly recommend all the students who have registered with IMS for the CFP course to attend these sessions as they are a great Value add.

Deepti Patel(Director Invest Edge)

I would certainly say that IMS Proschool sessions are the best way to prepare for CFP Exam in the shortest possible time. Excelsheet training was the best, not it helps in clearing the final exam but also helped us in making financial plan for clients.

Prof.Mahesh Renguntwar (Management College, Pune)

About Proschool

- ❑ IMS Proschool is an initiative of IMS learning Resources Pvt. Ltd an organization engaged in training students for last **35 years**.
- ❑ Proschool was launched in **2006** with the objective of equipping graduates and young professionals, with relevant and current skills through standards-based and thoroughly tested certification programs to enable them to perform in a wide spectrum of business environs.
- ❑ Ranked **#4 Trusted Brand in Education** and **44th amongst Most Trusted Service Brands across India** (AC-Nielsen & Brand Equity Study)
- ❑ IMS Proschool along with parent organization has trained **more than 3 lakhs candidates** for different competitive exams and professional courses
- ❑ 90 centers across India for Management Training and 7 centers of Proschool for Financial Training
- ❑ Proschool has also trained over **20000 professionals** from well known organizations like **State Bank of India, Bank of India, UTI, Kotak Group, ICICI Group, Sundaram BNP Paribas, Citibank** etc.,

Partnerships



Funded by National Skill Development Corporation, a PPP promoted by the Union Ministry of Finance, Govt of India to offer skills based education



Tie-up with National Stock Exchange's NCFM for Certification test administration



Approved learning partner of CIMA (UK) for management accounting qualification



Approved prep provider of CFA Institute, USA for CFA Program



Partner with NISM (National Institute of Securities Market - an Initiative of SEBI) to spread Financial Literacy and Awareness across 135,000 schools in the country.



Corporate Clients

Trained & Certified employees of following Organizations

- State Owned Banks
- Foreign Banks
- Security Houses
- Mutual Fund Companies
- Insurance Companies
- IT/ITES



THE TIMES OF INDIA



Our other industry oriented programs

- Chartered Financial Analyst
- Financial Modeling
- Certified Financial Planner Certification
- Financial Services Foundation
- Chartered Institute Management Accountant
- Business Analytics
- IFRS
- Association Of Chartered Certified Accountants
- Digital Marketing

- Financial Modeling & Business Analysis
- Business Analytics
- Banking & Financial Planning
- Management Accounting
- Data science
- Global accounting

Post Graduate Program (6 Month – 9 months)



To Know more visit us at www.proschoolonline.com

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Or call your nearest IMS Proschool centre

City	Contact no
Bangalore	080-42024234, 9900799981
Chennai	044-43015724, 9884909158
Hyderabad	040-66339989, 9701233472
Mumbai(Andheri)	022-65253090, 9619207323
Navi Mumbai	9967203387
New Delhi	011-43658144, 9871878870
Gurgaon	9971414355
Pune	9763416050, 8454988892
Thane	7710012857, 9987753387
Other Cities	022-65285393, 9769162050
Kochi	0484-4300 900, 96456 29999