

FPSB™ Retirement and Tax Planning Specialist

Are you ready for a world-class learning experience brought to you by Financial Planning Standards Board Ltd., the standards-setting body for the global financial planning profession? Taken either online or with an instructor, the FPSB® Retirement and Tax Planning Specialist course prepares you to develop strategies to help clients optimize their wealth accumulation and cash flow leading up to and during retirement, and to advise on the role of tax planning in supporting client goals.

The course teaches you to consider your clients' personal financial goals, risk tolerance and risk capacity, asset locations, the structure and impact of public and private retirement plans, and how taxation will affect your clients' financial situation and goals. To be recognized by employers, clients and the public for your superior skills and knowledge in retirement and tax planning, complete the roadmap below to obtain FPSB® Retirement and Tax Planning Specialist certification in India.

The Roadmap to Certification

