



**LIVE YOUR TODAY.
PLAN YOUR TOMORROW.**

CFP® CERTIFICATION PROGRAM

Fast Track Pathway



ABOUT US

FPSB India, is the leading financial planning body in India and is dedicated to establishing, upholding, and promoting professional standards in financial planning throughout India. FPSB India offers the globally recognized CFP® certification, which represents excellence in financial planning through rigorous competency and ethical standards. It is home to over 2,730+ CFP® professionals in India and part of a global network of organizations representing 223,770+ CFP professionals worldwide.

FPSB India is the Indian subsidiary of Financial Planning Standards Board Ltd., the global standards-setting body for the financial planning profession and owner of the international CERTIFIED FINANCIAL PLANNER® certification program.

FPSB India Ranked 4th in the world for net growth in the number of CFP professionals, and Ranked 3rd in Asia

223,770+

CFP
Professionals
Globally

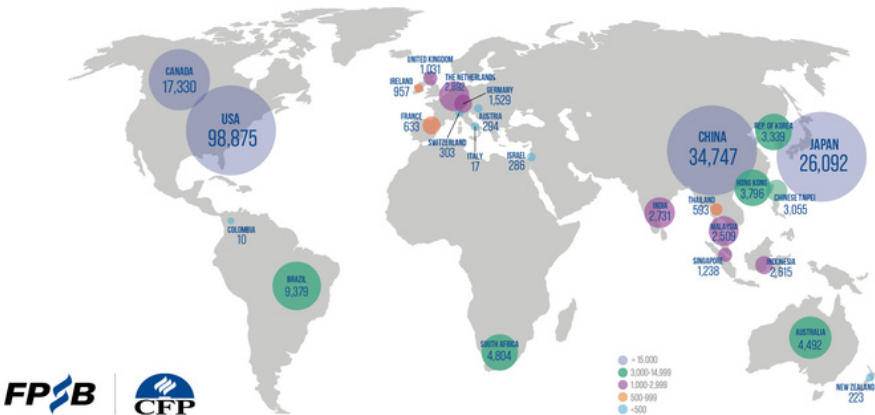
2,730+

Indian CFP
Professionals
driving
excellence

↑ 8.5 %

Growth in the
Number of CFP
Professionals
(2023)

CFP Professionals by Territory



10X increase in the number of CFP professionals since 1990, when CFP certification first went international

*Data mentioned as on 31st December 2023

VALUE OF CFP CERTIFICATION



PUBLIC: Consumers rely on the **CERTIFIED FINANCIAL PLANNER** marks to help them identify competent, ethical financial planners who have committed to placing their clients' interests first.



PRACTITIONERS: Financial services firms value **CERTIFIED FINANCIAL PLANNER** professionals for their contributions to productivity and profitability, as well as for lowering firms' compliance risks and increasing client satisfaction.



FIRMS: Financial services firms value **CERTIFIED FINANCIAL PLANNER** professionals for their contributions to productivity and profitability, as well as for lowering firms' compliance risks and increasing client satisfaction.



REGULATORS: **CERTIFIED FINANCIAL PLANNER** professionals rate compliance with relevant laws and regulations, adherence to an ethical code and acting in the best interest of clients as most important when providing financial planning advice to clients.

WHY A STUDENT SHOULD PURSUE CFP CERTIFICATION?



The **CERTIFIED FINANCIAL PLANNER®** is the Global Symbol of Excellence in Financial Planning and the most desired and respected global certification for those seeking to demonstrate their commitment to competent and ethical financial planning practice.



Join a global network of 223,770+ **CERTIFIED FINANCIAL PLANNER** professionals who prioritize the client's interests and are recognized in 27 countries/territories worldwide.



Enhanced career and employment opportunities with financial services companies. Widely sought by banks, MNCs, distribution houses, AMC, insurance companies, equity brokerage and financial planning firms.



More revenue streams by increasing product and service offerings for clients.



Candidates are prepared to fulfil the professional expectations of the financial services companies through the CFP certification program.



Due to the vast array of economic opportunities present on the global and Indian market, financial planning and investment are the two industries experiencing the fastest growth.

CAREER OPPORTUNITIES FOR CFP® CERTIFICANTS



FAST TRACK PATHWAY

FPSB India recognizes the need for an accelerated pathway which tests the competency of professionals in financial services having specified education qualification and relevant work experience.



UPON REGISTRATION THROUGH THIS PATHWAY

COMPLETE EDUCATION OF INTEGRATED FINANCIAL PLANNING COURSE (IFP)



CFP® EXAM



FINANCIAL PLANNING ASSESSMENT (FPA)

EXEMPTION FROM SPECIALIST EXAMS

Investment Planning Specialist (IPS)
Retirement and Tax Planning Specialist (RTPS)
Risk and Estate Planning Specialist (REPS)

This pathway tests the all-round financial planning knowledge, skills and abilities expected of CERTIFIED FINANCIAL PLANNER® professionals.

ELIGIBILITY CRITERIA

Approved Qualifications/Professional Certifications:

- Chartered Financial Analyst, from CFA Institute (USA)
- Certified Public Accountant, from AICPA (USA), CMA, ACCA
- Chartered Accountant, from ICAI, CA(Inter) with 3-year Articleship+B.Com
- Fellow Member of Insurance Institute of India (Life/General)
- CAIIB from IIBF with Graduation in any discipline
- Postgraduate degree in Economics, Commerce, Finance/Financial Planning from a UGC approved University
- MBA (all streams) and PGDM (all streams) from an AICTE approved institution/Ministry of Education approved institution/such other Indian or Foreign institution or business school

Work Experience Criteria:

At least three years of prior work experience at the time of submission of documents will be considered in case of employees of any bank, non-banking Finance Company (NBFC), Mutual Fund Asset Management, Insurance Company, Securities Company, Portfolio Manager, Brokerage, Registered Investment Adviser (in the capacity 'persons associated with investment advice'), Treasury Department of a Company registered with the RoC and *Academic institution or FPSB's Authorized Education Provider.

**The experience as an Academic will be exclusive for three years and shall not be combined with corporate experience.*

**Self-Employed
Professionals
May Check Work
Experience Eligibility
[here.](#)**

Eligibility of Fast Track Pathway for Other Professionals:

FPSB India offers this accelerated route to the following category of Professionals also:

- Candidates whose CFP Certification lapsed 5 years and prior
- Candidates who had passed CFP® Exam 5 years and prior
- SEBI Registered Investment Adviser (RIA) with active license
- CFP professionals in good standing with one of the Affiliate bodies of FPSB Ltd.
- Existing Regular Pathway candidates who deem themselves eligible for Fast Track Pathway

ROADMAP TO CFP CERTIFICATION



STEP 1: ELIGIBILITY CHECK & REGISTRATION

- Fill out the application form online, upload scanned copies of relevant documents and pay the document verification fee.
- Upon approval, pay a consolidated fee for registration and purchase of course material.
- Candidate may register through an [Authorized Education Provider](#) or self-study.

STEP 2 : EDUCATION

- Access the Student Portal - myFPSBLearning.
- Complete the education to be eligible to take the CFP® Exam / *Financial Plan Assessment (FPA).
- Candidate must complete the Global Ethics course on the student portal before taking the CFP® Exam.

STEP 3 : CFP® EXAM & FINANCIAL PLAN ASSESSMENT

- Exam Registration Window is open on the student portal from 1st - 5th of every alternate month.
- Exam Duration: 3 hours, Two sections in multiple-choice format with 25 stand-alone Questions and 25 Questions based on a Case Study.
- Online proctored / in-person at **NSE Test Centres.
- Conducted every alternate month.
- For FPA- Candidates prepare a financial plan on a provided Case Study. Assessment cycle for the same occurs every alternative month

STEP 4 : CERTIFICATION

- After successfully clearing the CFP Exam and the Financial Plan Assessment (FPA), apply for the CFP certification on the student portal.
- Complete CFP Professional Ethics Declaration on your student portal.
- Pay initial certification fee to become certified as a CFP® professional.

*FPA can be submitted before or after appearing for the CFP Exam

**For exams taken at NSE test centers, students get access to OpenOffice. Spreadsheets are now available in Scratchpad for exams taken in proctored mode.



IMPORTANT NOTE: CFP professionals must renew their certification annually by completing 15 Continuing Professional Development (CPD) points and paying an annual fee.

For further details/updates about the program please write to us at indiacfpchallenge@fpsb.org

FOR DETAILED GUIDELINES
CLICK HERE!

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