



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

CFP® CERTIFICATION PROGRAM

Regular 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

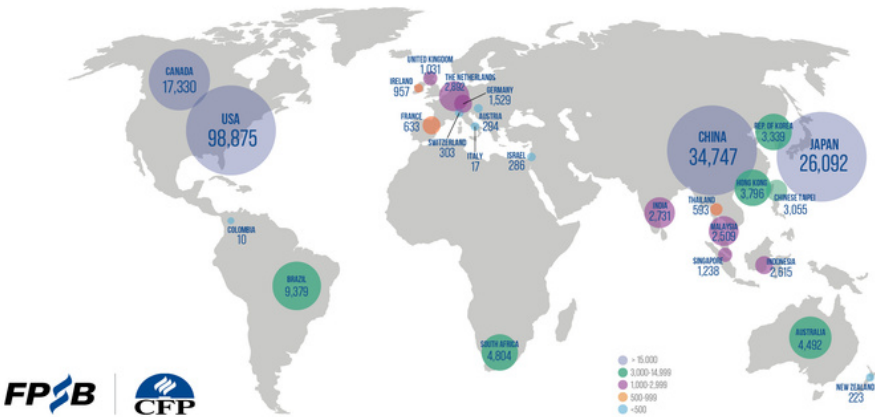
2,730+

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.



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.



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.



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 213,000+ **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



ELIGIBILITY CRITERIA

| FOR ENROLMENT | FOR CERTIFICATION |
|--|---|
| Minimum 18 years of age | Must have completed graduation |
| Must be an Indian Resident | Must have passed all 3 Specialist Courses along with CFP® Exam and the Financial Plan Assessment (FPA). |
| Must have completed HSC/12th or other equivalent qualification | Must have the requisite <u>work experience</u> i.e. 3 years Unsupervised OR 1-year Supervisory Experience in the Finance Industry |

ROADMAP TO CFP CERTIFICATION

STEP 1 : ENROLMENT

Student Registration with FPSB India
(Annual Subscription beyond 1 year)

STEP 2 : EDUCATION - SPECIALIST COURSES

- Course purchase - Investment Planning Specialist (IPS), Retirement and Tax Planning (RTPS) and Risk and Estate Planning (REPS) in any sequence on the Student Portal.
- Choose Pathway - Self-paced / Instructor-led
- Complete Ethics on the Student Portal.

STEP 3 : EXAMS - SPECIALIST COURSES

- Complete the education on the student portal to be eligible to take the exam for the respective courses.
- Exam Registration Window is open on the student portal from 1st - 5th of every month
- Exam Duration: 2 hours each, 75 multiple-choice questions, online proctored / in-person at NSE Test Centres. Conducted every month.

STEP 4 : EDUCATION - INTEGRATED FINANCIAL PLANNING

- Take the Specialist Certification for ALL the three Specialist courses.
- Course Purchase - Integrated Financial Planning (IFP) course.
- Choose Pathway - Self-paced / Instructor-led
- Complete the education on the student portal to be eligible to take the CFP® Exam / *Financial Plan Assessment (FPA).

STEP 5 : 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.

STEP 6 : EXPERIENCE

- After successfully clearing the CFP Exam and the Financial Plan Assessment (FPA), apply for the CFP certification on the student portal.
- Ensure that the requisite education and work experience criteria (Supervised / Unsupervised) are met at the time of application.

*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 enquiry.india@fpsb.org.

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