

CFP® CERTIFICATION PROGRAM

FAST TRACK PATHWAY



ABOUT FPSB INDIA

FPSB India is the Indian subsidiary of Financial Planning Standards Board Ltd. (FPSB Ltd.), the global standards-setting body for the financial planning profession and owner of the international CERTIFIED FINANCIAL PLANNER® certification program. FPSB India offers the globally recognized CFP® certification, which represents excellence in financial planning through rigorous competency and ethical standards. It is home to 3,215 CFP® professionals in India and part of a global network of organizations representing more than 230,648 CFP® professionals worldwide.

ABOUT CFP® CERTIFICATION

CERTIFIED FINANCIAL PLANNER® or CFP® certification is the benchmark for global excellence in financial planning. Candidates acquiring CFP® certification are equipped with multifaceted skills in the evolving space of financial planning, including Investment Planning, Retirement & Tax Planning, and Risk & Estate Planning. FPSB's CFP® certification is recognized in 28 territories across the globe for its rigor and relevance, ensuring that the graduates are well-equipped to meet the growing demands of the contemporary financial services industry.



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 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 **230,648+** CERTIFIED FINANCIAL PLANNER professionals who prioritize the client's interests and are recognized in 28 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 fulfill 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® PROFESSIONAL





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)



ADVANTAGE

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.

**Please note that studying all course modules is mandatory, as the Final CFP(R) exam includes questions from all modules."*

ELIGIBILITY CRITERIA

APPROVED QUALIFICATIONS/PROFESSIONAL CERTIFICATIONS:

- ✓ CFA(USA), CPA from AICPA(USA), CMA(USA),CMA(India), ACCA(UK)
- ✓ CA from ICAI, CA(Inter) with Bachelors Degree & 3 year Articleship
- ✓ Fellow Member of Insurance Institute of India (Life/General)
- ✓ Advanced Wealth Management Course, CAIIB+B.Com from IIBF
- ✓ 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 India's Authorized Education Provider.

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

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

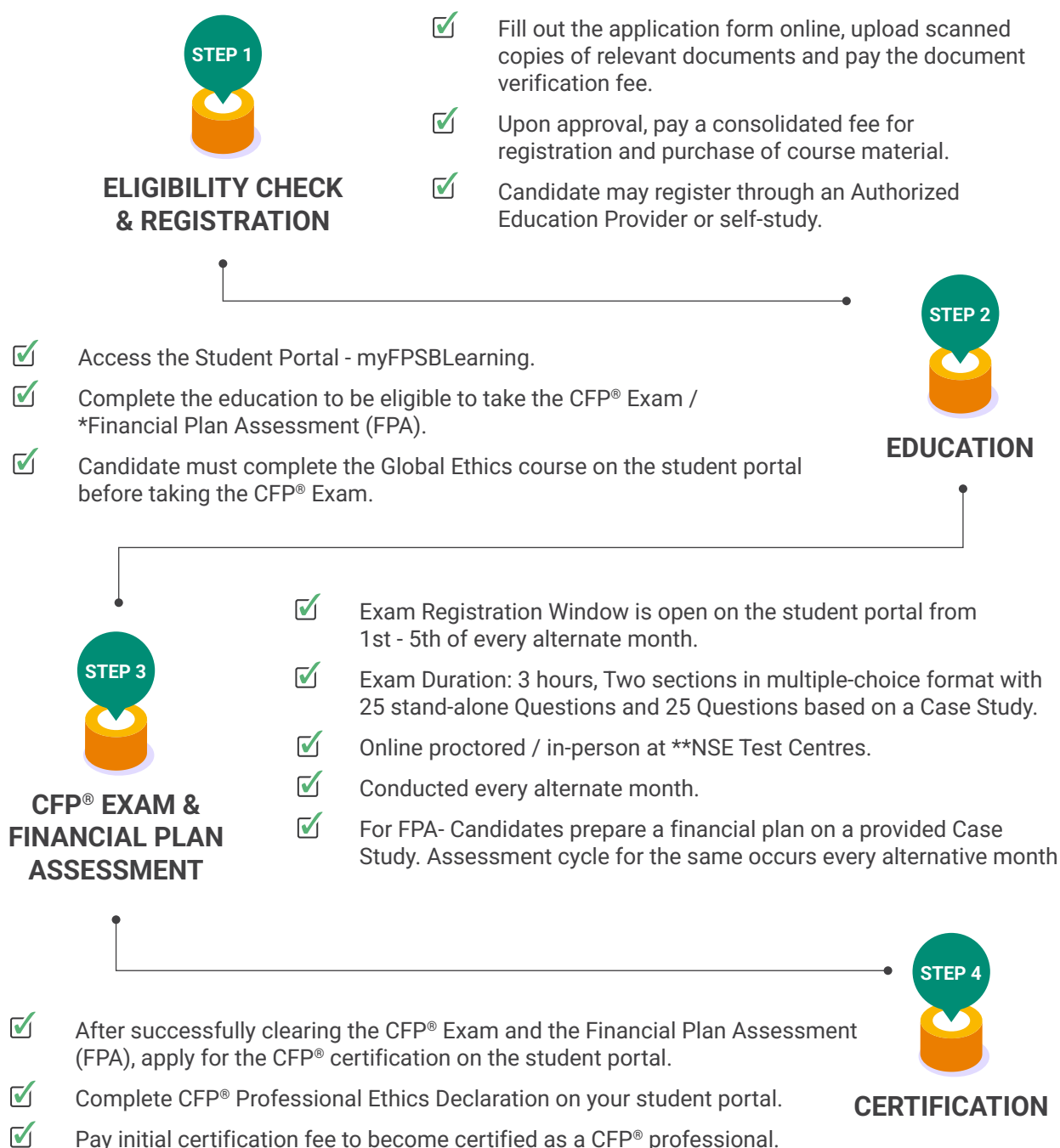


CFP® professionals in good standing with one of the Affiliate bodies of FPSB Ltd.



Existing Regular Pathway candidates who deem themselves eligible for Fast Track Pathway

ROAD MAP TO CFP® CERTIFICATION



**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.

Contact us: Email at enquiry@fpsb.in or visit www.fpsb.in for more details