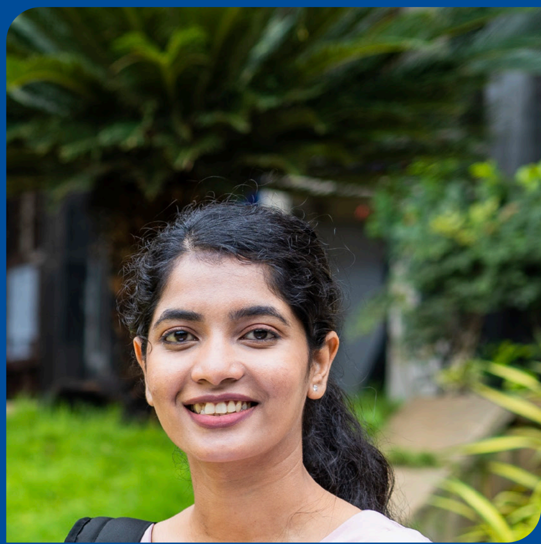
CFP® CERTIFICATION PROGRAM

REGULAR PATHWAY



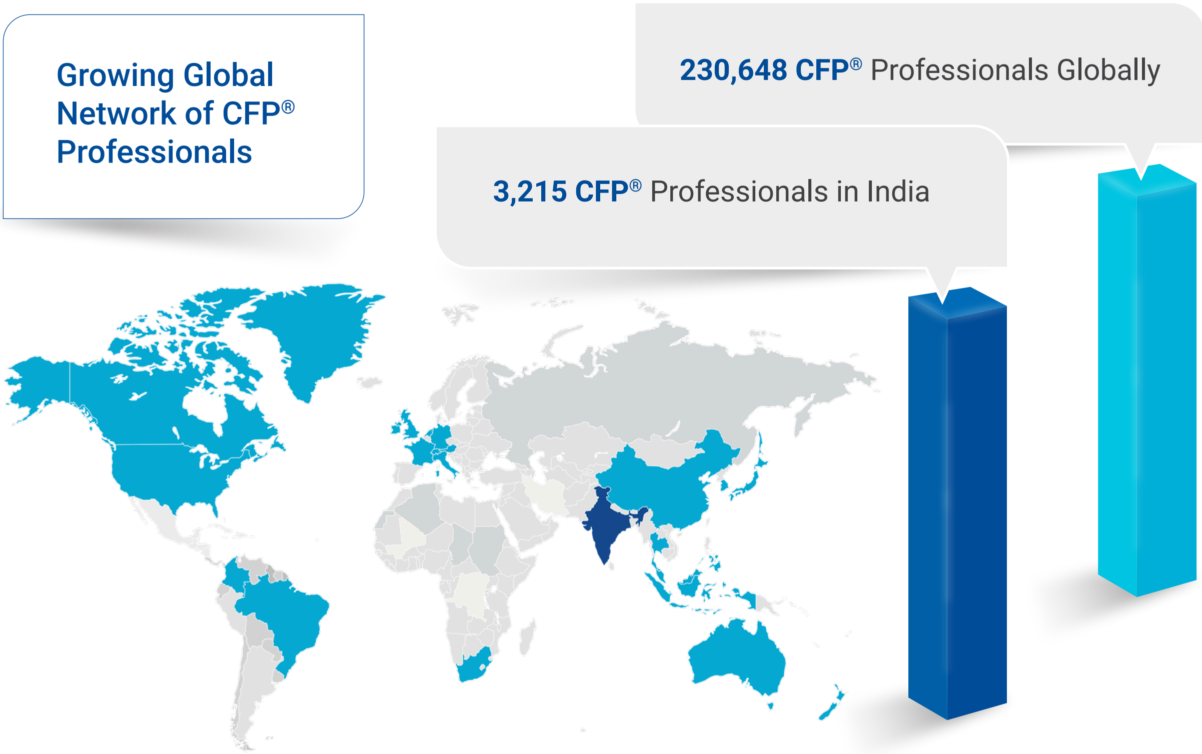
FPSB INDIA | CFP®

ABOUT FPSB INDIA

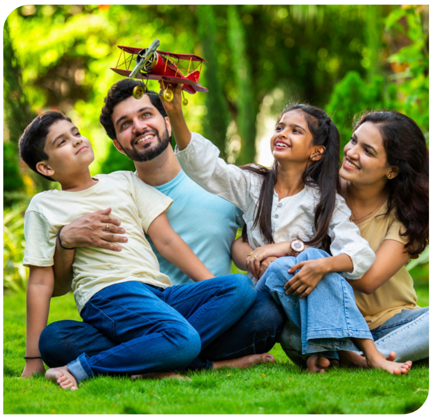
FPSB India is the Indian subsidiary of Financial Planning Standards Board Ltd. (FPSB Ltd.), the global standards-setting body for the financial planning profession and owner of the international CERTIFIED FINANCIAL PLANNER® certification program. FPSB India offers the globally recognized CFP® certification,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

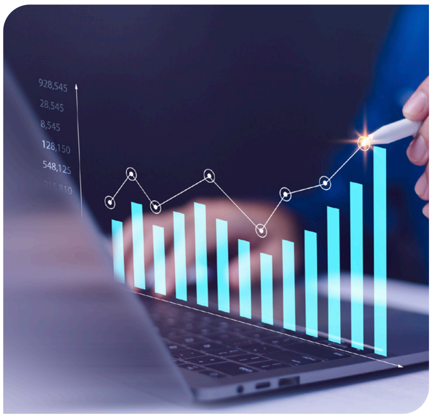


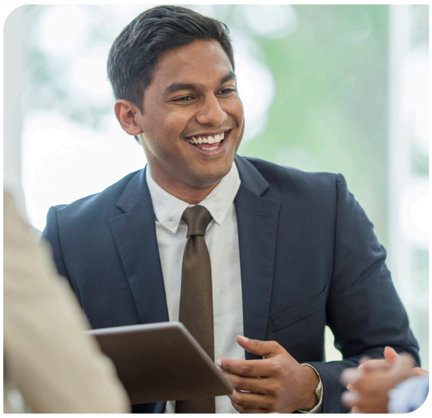
VALUE OF CFP® CERTIFICATION



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.

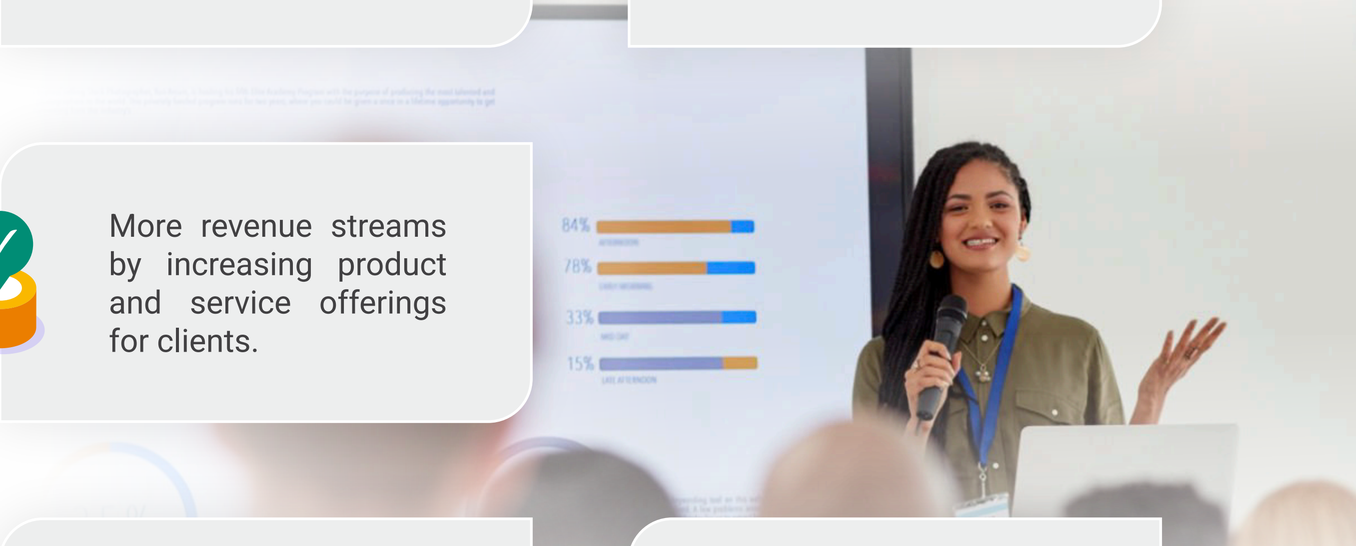
WHY CFP® CERTIFICATION?

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

- Private Banking
- Investment Consulting
- Relationship Management
- Insurance Consulting
- Tax Planning, Retirement Planning and Estate Planning
- Fund Management
- Portfolio Management
- Sustainable Finance
- Financial Consulting Services
- Financial Products Development and Management

REGULAR PATHWAY

Embark on your journey to becoming a globally recognized CFP® professional through the regular pathway. Gain in-depth expertise in financial planning and elevate your career with a professional certification that sets you apart in the dynamic world of personal finance.

ELIGIBILITY CRITERIA

FOR ENROLLMENT	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 work experience i.e. 3 years Unsupervised OR 1-year Supervisory Experience in the Finance Industry

ROAD MAP TO CFP® CERTIFICATION

1 ENROLLMENT	☑	Student Registration with FPSB India (Annual Subscription beyond 1 year)
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.
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 Test Centres. Conducted every month.
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).
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 Test Centres.
	☑	Conducted every alternate month.
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.

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