

# CFP<sup>®</sup> 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 3,534 CFP® professionals in India and part of a global network of organizations representing more than 236,300 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 29 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 **236,300** CERTIFIED FINANCIAL PLANNER professionals who prioritize the client's interests and are recognized in 29 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)
- ✓ 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



## 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.

- ✓ 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.



## EDUCATION

- ✓ 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 DEXIT 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



## CFP® EXAM & FINANCIAL PLAN ASSESSMENT

- ✓ 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.



## 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](mailto:enquiry@fpsb.in) or visit [www.fpsb.in](http://www.fpsb.in) for more details