

# MADHAVI INSTITUTE OF FINANCIAL SERVICES



FINANCIAL PLANNING STANDARDS BOARD



## CFP Course details

### What is CFP;-

CFP or the Chartered Financial Planner is an emerging professional course that's often chosen by finance enthusiasts who are interested in planning and managing organizational finances. This course is a globally recognized certification that offers several job opportunities in over 26 countries worldwide.

Currently there are more than 1, 70,000 Chartered Financial Planner certificate holders, and as the demand of this profession continues to grow, so does the scope in terms of opportunities and compensation. With the wealth and financial planning industry growing at a rate of 20% every year.

### Course Details:-

CFP is a professional certification course that can be pursued right after completing your 12th.

### Chartered Financial Planning Course Details:-

**Board** : Financial Planning Standards Board (FPSB)

**CFP Course Duration** : 6 months to 1 years

**MIFS Coaching Details** : CFP full time coaching, NISM-3 modules; mutual fund, Equity and derivatives certification, we are providing mock papers, study materials

**Coaching Fee** : Rs 50,000/-

**Eligibility Criteria** : Students who are at least age 18 and have completed HSC/12th (Std XII/HSC)

**Parth way of CFP/ PROCESS TO COMPLETE THE COURSE:-**



**Registration:-**

► Registration is valid for 365 days from purchase, and can be renewed annually .If

You have questions prior to payment please contact [IndiaCFPStudent@fpsb.org](mailto:IndiaCFPStudent@fpsb.org).

► Students can enroll at <https://india.fpsb.org/students/>.

## **Syllabus:-**

### **INVESTMENT PLANNING SPECIALIST:-**

#### EDUCATION MODULES

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|--|---|---|
| <p>① <b>Personal Financial Management</b></p> <ul style="list-style-type: none"><li>• Client Financial Situation</li><li>• Time Value of Money</li><li>• Cash Flow Demands and Conflicts</li><li>• Budget and Emergency Fund</li><li>• Debt and Financing Alternatives</li><li>• Financial Management Strategies</li></ul> | <p>② <b>Investment Planning/ Asset Management</b></p> <ul style="list-style-type: none"><li>• Asset Classes and Securities</li><li>• Pooled Investment Products</li><li>• Principles of Investment Risk</li><li>• Investment Performance Management</li><li>• Investment Theory</li><li>• Asset Allocation</li><li>• Wealth Management</li><li>• Behavioral Finance</li><li>• Objectives, Constraints and Suitability</li></ul> | <p>③ <b>Regulatory Environment, Law/ Compliance</b></p> <ul style="list-style-type: none"><li>• Client Best Interest</li><li>• Economic Environment</li><li>• Social and Political Environments</li><li>• Compliance and Implications</li><li>• Anti-Money Laundering</li></ul> |
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### **RETIREMENT AND TAX PLANNING SPECIALIST:-**

#### EDUCATION MODULES

- |  |   |
|--|---|
| <p>① <b>Retirement Planning</b></p> <ul style="list-style-type: none"><li>• Retirement Principles</li><li>• Retirement Objectives</li><li>• Retirement Needs, Analysis and Projections</li><li>• Sources of Retirement Cash Flow</li><li>• Retirement Cash Flow, Withdrawal Projections and Strategies</li></ul> | <p>② <b>Tax Planning and Optimization</b></p> <ul style="list-style-type: none"><li>• International Taxation</li><li>• Cross Border and Source Rules</li><li>• Tax Strategies</li><li>• Accounting Standards and Research</li></ul> |
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### **RISK AND ESTATE PLANNING SPECIALIST:-**

#### EDUCATION MODULES

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|--|--|
| <p>① <b>Risk Management and Insurance Planning</b></p> <ul style="list-style-type: none"><li>• Principles</li><li>• Risk Exposures</li><li>• Intro to Insurance</li><li>• Insurance Company/Advisor Selection</li><li>• Strategic Solution</li></ul> | <p>② <b>Estate Planning</b></p> <ul style="list-style-type: none"><li>• Estate Planning Terminology</li><li>• Wealth Distribution Goals</li><li>• Estate Planning Process</li><li>• Transfer During Life and at Death</li><li>• Planning for Incapacity</li><li>• Estate Planning Strategies</li></ul> |
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## FINANCIAL PLANNING CAPSTONE COURSE:-

**EDUCATION**

**① The Financial Planning Process**

- Financial Planning Process
- Practice Standards
- Professional Skills
- Client Characteristics
- Client Engagement and Communication
- Critical Thinking

**② Engaging Clients for Life**

- Introduction to the Discovery Process
- Appreciative Inquiry
- Discovery Process Applied
- Goal Determination, Refinement and Setting
- Develop Financial Planning Recommendations
- Presenting Recommendations to Clients

**③ Developing Effective Financial Plans**

- Financial Planning Overview
- Financial Plan Elements
- Developing Effective Plans
- Sample Financial Plans
- Financial Plan Assessment

### CFP Exam Details:-

- ✚ The exam is 3 hours long
- ✚ 75 multiple-choice questions (4 possible answer choices)
- ✚ The exam consists of two sections
- ✚ Computer-based testing format available on Mettle and at NSE test centers

### CONTACT US:-

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