CFP PROGRAM

BY

MAHDAVI REDDY

CERTIFIED FINANCIAL PLANNER

WHY CERTIFIED FINANCIAL PLANNER COURSE

- Are you ready for a world-class learning experience and certification brought to you by Financial Planning Standards Board Ltd., the standards-setting body for the global financial planning profession? Taken through an Authorized Education Provider, the FPSB® Financial Planning Capstone course prepares you to draw on the knowledge gained through FPSB Ltd.'s specialist education tracks (investment planning; retirement and tax planning; and risk and estate planning) to develop strategies to help clients achieve their financial and life goals. The course teaches you to integrate technical topics, behavioral finance principles and client engagement skills to build relationships of trust; identify client goals, needs and objectives; and develop effective financial plans. With CERTIFIED FINANCIAL PLANNERCM certification, the global symbol of excellence in financial planning, you will join a growing international community of ~190,000 professionals who are recognized by employers, clients and the public for their superior skills and knowledge, for their commitment to ethics and professionalism, and for putting their clients' interests first.

GLOBAL CERTIFICAITON

- The CERTIFIED FINANCIAL PLANNERCM credential is the most desired and respected global certification for those seeking to demonstrate their commitment to competent and ethical financial planning practice.

- As of 1 April 2019, the CFPCM certification program in India is now directly administered by U.S.-based Financial Planning Standards Board Ltd. (FPSB Ltd.), owner of the international CERTIFIED FINANCIAL PLANNER certification program outside the United States. FPSB Ltd. partners with its global network of Affiliate organizations to administer CFPCM certification programs in 26 countries and territories around the world,

ELIGIBILITY AND COURSE DETAILS

- Students who are at least age 18 and have completed HSC/12th (Std XII/HSC) may register for the Investment Planning Specialist or Retirement and Tax Specialist course at present.

PROCESS TO COMPLETE THE COURSE

- Step 1. Register with FPSB Ltd. and Purchase Course Material
- Step 2. Complete the Education Course Through One of Three Modes
- Step 3. Pass the Specialist Course Exam
- Step 4. Meet the FPSB Ltd Ethics Requirement
- Step 5. Get Certified by FPSB Ltd.
- step 6. Stay Certified

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.
- **Students can enroll at** https://india.fpsb.org/students/.

ADVANTAGES

- Opportunity to join a global network of nearly 190,000 CERTIFIED FINANCIAL PLANNER professionals committed to putting the client's interests first.
- Enhanced career and employment opportunities with financial services companies. Your services are sought by banks, distribution houses, AMC, insurance companies, equity brokerage and financial planning firms.
- Personal satisfaction in achieving the financial planning profession's global standard of excellence.
- Satisfied clients who appreciate a comprehensive approach to financial planning, extending in return long-term relationships and referrals.
- Your expertise and credibility as a qualified financial planning professional is instantly communicated.
- More revenue streams by increasing your product and service offerings for clients.
- Recognition in more than 27 territories around the world.
- Trust among Indian consumers in your commitment to competent and ethical financial planning practices.

STEPS TO BECOME CFP

Individuals in India can be recognized as a CERTIFIED FINANCIAL PLANNER professional upon:

- Completing all specialist education courses and related exams
- Meeting FPSB Ltd.'s ethics requirement
- Completing through an Authorized Education Provider the FPSB® Financial Planning Capstone Course (includes a Financial Plan assessment)
- Meeting FPSB Ltd.'s experience requirement
- Passing the CFP exam
- Paying an annual certification fee

INVESTMENT PLANNING SPECIALIST

EDUCATION MODULES

1. Personal Financial Management
   - Client Financial Situation11
   - Time Value of Money
   - Cash Flow Demands and Conflicts
   - Budget and Emergency Fund
   - Debt and Financing Alternatives
   - Financial Management Strategies

2. Investment Planning/ Asset Management
   - Asset Classes and Securities
   - Pooled Investment Products
   - Principles of Investment Risk
   - Investment Performance Management
   - Investment Theory
   - Asset Allocation
   - Wealth Management
   - Behavioral Finance
   - Objectives, Constraints and Suitability

3. Regulatory Environment, Law/ Compliance
   - Client Best Interest
   - Economic Environment
   - Social and Political Environments
   - Compliance and Implications
   - Anti-Money Laundering

RETIREMENT AND TAX PLANNING SPECIALIST

EDUCATION MODULES

1 Retirement Planning

- Retirement Principles
- Retirement Objectives
- Retirement Needs, Analysis and Projections
- Sources of Retirement Cash Flow
- Retirement Cash Flow, Withdrawal Projections and Strategies

2 Tax Planning and Optimization

- International Taxation
- Cross Border and Source Rules
- Tax Strategies
- Accounting Standards and Research

RISK AND ESTATE PLANNING SPECIALIST

EDUCATION MODULES

1 Risk Management and Insurance Planning

- Principles
- Risk Exposures
- Intro to Insurance
- Insurance Company/Advisor Selection
- Strategic Solution

2 Estate Planning

- Estate Planning Terminology
- Wealth Distribution Goals
- Estate Planning Process
- Transfer During Life and at Death
- Planning for Incapacity
- Estate Planning Strategies

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

FEE DETAILS

PARTICUALRS	COST IN DOLLARS	COST IN RUPEES
FPSB REGISTRATION	65	4800
MATERIAL COST FOR PER COURSE (Investment)	60	4450
Cost for retirement & tax	60	4450
Cost for material on risk	60	4450
Cost for material for capstone Final module	120	8900
Exam fee for 1, 2, 3 each 61 $	183	13550
Exam fee for final module	100	7400
Total	648	48000

Madhavi institute of financial services charges for training fee for the total course 40000/- for six months

CURRENT JOB OPENINGS

Sl No	Job Title	City
1	Assistant Financial Planner	Gurugram
2	Financial Planner	Jaipur
3	Relationship Manager	Jaipur
4	Job for Financial Planners	Jaipur
5	Para Planner-Intern	MUMBAI
6	Position: Junior Financial Planner (Manager)	Hyderabad
7	Position - AVP, Family Office Services – reporting directly to the CEO	Hyderabad
8	Job opening at Network FP - Division - Knowledge Management - Asst Manager, Manager, Sr. Manager	MUMBAI
9	Paraplanners (Junior Financial planner) and Client Success Managers	BANGALORE
10	Job opening at Ladder7 Financial Advisories	MUMBAI
11	Job opening at IndianMoney.com	BANGALORE
12	Financial Planner. (CFP) This candidate could be a fresher or experienced	MUMBAI

About MIFS

MADHAVI INSTITUTE OF FINANCIAL SERVICES

- WE ARE PROVIDING TRAINING AND PLACEMENT ASSISTANCE TO FINANCIAL PROFESSIONALS SINCE DECADE. OUR CREDENTIALS ARE
- DEDICATED TO BRING MORE FINANCIAL PLANNING PROFESSINALS TO THE BIFS INDUSTRY
- ONLINE / OFF LINE MODE IS AVAILBALE
- CLASS ROOM TRAINING ALONG WITH PRACTICAL APPROACH TO BRING READY TO TAKE UP THE CARREER
- CAREER GUIDANCE WITH PRUDENCE ADVISE
- PLACEMENT ASSISTANCE
- 90% PASS PERCENTAGE

FEED BACK FROM OUR STUDENTS

- I will always be grateful to you for your support and kindness. It would be impossible to count all the ways that you've helped me in my career. Thank you so much Madam for all that you've done — I only hope I can return the favor sometime in the future. Thanks for being a good mentor.

BY SRI VATSAV (CFP) CONTACT NO: 8500826098 WORKING IN – HAPPY COIN

- Proud to say that I am a student of Madhavi Institute of Financial Services, MIFS, under the guidance of Mrs. Madhavi Reddy madam. She provided guidance through required subject material and clarifying with detailed explanations.

BY Upadrashta srinivasa rao(CFP), CONTACT NO: 9100950465, WORKING IN EENADU GROUP

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