

# SNGIST

## CERTIFIED FINANCIAL PLANNING<sup>CM</sup> (CFP<sup>CM</sup>) 2016-2017 BATCH

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# SNGIST

Faculty of Management Studies  
Centre for Strategic Initiatives & International Affairs  
Mannam P.O, North Paravur, Ernakulam, Pincode - 683520  
LL: 0484 2887 000 | HP: 999 551 8846, 984 7 824 893, 729 3 729 729

# CERTIFIED FINANCIAL PLANNING<sup>CM</sup> (CFP<sup>CM</sup>)

Certified Financial Planning is among the fastest growing careers in the world. In India, the international CFP certification is awarded by the Financial Planning Standards Board of India (FPSB India). The CFP certification is rated as a Gold Standard and gets its holder acceptance and recognition across a diverse range of Financial organizations in 24 countries around the world. There are currently over 1,00,000 CFP<sup>CM</sup> Charters worldwide and around 1820 + CFPs in India. As per current industry estimates, the requirement for financial advisers will be around 50000 in the coming years.

## WHY CFP<sup>CM</sup> ?

CFP is the world's most prestigious Certification for those wanting to make a career in the field of Finance.

Once you are a CFP in India, you can practice as a CFP in 24 countries across the globe. It allows you to join an elite group of CFP<sup>CM</sup> Professionals in 24 countries across the globe

A CFP is recognized as a leader in the field of Financial Planning across the globe.

|                          |                   |
|--------------------------|-------------------|
| ACCEPTED IN 24 COUNTRIES | 6-8 MONTHS COURSE |
| START WITH 4.5 LAKHS     | GOLD STANDARD     |

## INDUSTRY DEMAND

50 companies which include top Bankers, Brokers, MF companies, Insurance Companies (Reliance, TATA, LIC, UTI, ICICI, etc) have signed a petition with the FPSBI board saying that they will be giving 1<sup>st</sup> preference to CFP certificants when it comes to recruitments.

Organizations are making it mandatory for their relationship managers, mutual fund advisors, wealth managers, to take up the CFP Certification Program

Over 3,00,000 CFP's are required on an immediate basis.

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## SCOPE / OPPORTUNITY

Pursuing CFP can widen the scope of an individual and open opportunities across various sectors and provide multiple career opportunities

- Banking
- Insurance
- Financial Planning
- Accounting & Tax
- Wealth Management
- Investment Advisory Services
- Mutual Funds
- Stock Broking
- Portfolio Management Services
- Financial Products Designing & More

A CFP professional can also freelance & manage finances for his/her friends, relatives or clients, thus generating an additional earnings stream in the form of commissions, brokerage, incentives, advisory etc.



Firms indicated that employing CFP<sup>CM</sup> professionals had a positive impact on clients' satisfaction with the firm and that employing CFP professionals led to increased client retention.



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## DEMAND FOR CFP

**CFP Certification:** Mandated by the Finance Industry and Regulatory Bodies.

An increasing number of multinational banks such as ICICI Bank, Standard Chartered Bank, American Express Bank and others have made it mandatory for their Relationship Managers to acquire the CFP certification in order to raise current service standards to optimum level. Regulatory bodies like SEBI, IRDA, PFRDA etc. are also gradually educating and encouraging consumers to consult CFPs for their financial needs. Along with this, **Charter Members of FPSB India have resolved that they will give first preference to CFPCM Charters during recruitment**

**CFP Certification:** Demand from the consumers.

With the spread of the internet, consumers now have access to a wealth of information about financial products. As a result, the consumer is evolving with respect to understanding the benefits and working of these products and services. Unqualified advisors will find it difficult to handle such finance-savvy consumers. Only professionals with appropriate knowledge and skill credentials will be able to serve such customers satisfactorily i.e. Certified Financial Planners.

CFP IN INDIA

1820 Numbers

FUTURE REQUIREMENT

50000 numbers

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## PATH & SALARY CFP

| Level & Expected Pay (Anually)   |
|----------------------------------|
| Entry Level salary Rs 4.5-6 lakh |
| Middle level salary Rs 7-9 lakh  |
| Senior Level Above Rs 10 lakh    |

## CHARTERS MEMBERS OF FPSB INDIA (CFP BOARD)



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## COURSE ELIGIBILITY

- BBA, B.Com, MBA and M.Com students.
- CA, CMA, CS aspirants, PhD scholars.
- Software professionals/ Business analysts looking forward to a career in finance domain.
- Working professionals aspiring for an exciting career in banks, BFSI and consulting.
- Finance professionals dreaming of overseas jobs in financial planning and wealth management.

## GET THE EDGE

**BECOME A  
CFP<sup>®</sup> PROFESSIONAL**  

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**THERE'S no higher  
FINANCIAL PLANNING  
CERTIFICATION  
IN THE WORLD**

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CFP's will be more desirable to executive recruiters & hiring managers since they are now seeking CFP<sup>CM</sup> Certificate holders for senior financial services & wealth management related jobs more than ever before

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## EXAM MODULE

Introduction to Financial Planning

*(No Separate Paper. 20% weightage in each of the following module)*

**Exam 1:** Risk Analysis & Insurance Planning

**Exam 2:** Retirement Planning & Employee Benefits

**Exam 3:** Investment Planning

**Exam 4:** Tax Planning & Estate Planning

**Exam 5:** Advance Financial Planning

## CFP<sup>CM</sup> EXAMINATION

- Exams are computer based with multiple choice
- No negative marking

**No of questions :** 75 questions of 1, 2 and 4 marks for tests 1-4 and 15 questions of 2,3,4 and 5 marks in test 5

**Maximum Marks :** 140 for 1-4 and 50 for 5

**Duration :** 120 minutes for tests 1-4 and 240 minutes for test 5

**THE CFP MARK REPRESENTS A SYMBOL OF TRUST AND MARK OF EXCELLENCE. TO YOUR CLIENTS, IT WILL PROVIDE REASSURANCE THAT YOU WORK TO THE HIGHEST PROFESSIONAL AND ETHICAL STANDARDS, ALWAYS PUTTING THEIR INTERESTS FIRST.**

**CALL US : 9995518846, 9847824893, 7293729729**