



MAESTRO FINPLAN ACADEMY

MR . BHUPESH P CHAUDHRI
Certified Financial Planner

Certified Financial Planner

Certified Financial Planner is US based course and FPSB Ltd owns the licensing authority for the CFP marks in India. Any individual who wants to make a career in the field of Personal Finance with Banking, Finance and Insurance, CFP provides a rewarding opportunity in the same.

Eligibility :

Any individual who has passed HSC or equivalent degree can enroll for the CFP course. Thus, you can become a professional even before completing your Graduation.

Duration :

This course can be completed within 12-14 months with tuitions only conducted once or twice a week (mostly on weekends) which makes it easily accessible for any one who is doing job or any other degree, to do this course without disturbing their daily routine tasks.

Examinations :

Exams are conducted at regular intervals by National Stock Exchange (NSE). Anyone pursuing this course can give the exams as per his/her convenience by choosing the date and time slot for exams as per his/her choice.

Features of this course :

- Rated as "One of the best Jobs" by U.S. News and World Report, 2012
- Rated as Gold Standard by Wall Street Journal.
- The most recognized and respected financial planning certification in 25 countries like USA, UK, Canada, Germany, Malaysia, Singapore etc. apart from India.
- Supported, recognized, promoted and preferred by 48 organizations of BFSI Industry.
- The course is flexible and has a pass rate of 65-70% globally.
- As on March 2018, there are approximately only 2000 CFP's in India as per FPSB
- Annual report for FY 2017-18 thus providing a huge scope for this degree in a country having a large number of working population.

Job Opportunities

As mentioned earlier, CFP certification provides varied professional opportunities in:

- Banking
- Insurance
- Financial Planning
- Accounting and Tax
- Wealth Management
- Investment Advisory Services
- Mutual Fund & Stock Broking
- Portfolio Management Services
- Other Financial Services

CFP Syllabus

LEVEL 1 : Investment Planning Specialist



LEVEL 2 : Retirement & Tax Planning



LEVEL 3 : Risk and Estate Planning



LEVEL 4



NOTE:

Level IV can only be appeared after completing the first 3 levels.
The passing rate will be as per the psychometric approach with NO
Negative marking with all MCQ questions.

Approximate Cost Associated with Course :

Particulars	Approx Amt. (in Rupees)
FPSB Registration Fees (1 year validity)	18,000/-
Study Material Fees (For all levels)	16,250/-
Exam Fees (Level I - III)	20,250/-
Exam Fees (Level IV)+ Financial Planning Assessment	23,000/-
Tuition Fees	33,999/-
TOTAL APPROX COST	111,499/-

NOTE :

Annual certification fees of ₹8600 for retaining membership with FPSB Ltd, US.

AMENITIES :

1. Live lecture recordings.
2. Physical Study Material.
3. Personal Doubt solving sessions.
4. Internal test before approving for the appearance of the main exam.
5. Also, sessions filled with practical examples as well as demonstrations along with theoretical studies.

IMPORTANT POINTS :

1. An individual can become a CFP OR choose to be a specialist in individual sectors with certifications provided by AMFI, IRDAI and SEBI. (Further details are awaited)
2. The exams can be appeared from the comfort of your home as per the available dates and the timings as convenient to you.
3. The candidate needs to go through a PRE-EXAM TEST before appearing for each of the levels. Likewise, there would be 4 pre-exam tests.
4. There will be an additional test on ETHICS which will be conducted before Level-4 examination ,each of the 4 level will carry an INDIVIDUAL RECOGNITION in the job market.
5. Also, since the registration of student is valid for 1 year, a student who clears first 3 levels Within 1 year will be eligible for EXTENSION OF ANOTHER 1 YEAR without any additional cost to complete the Level-4 exam.

ENROLL NOW !

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