



MAESTRO FINPLAN ACADEMY

YOUR PATH TO FINANCIAL EXCELLENCE

Certified Financial Planner CFP

A comprehensive, globally recognised professional certification for careers in personal finance, banking, and wealth management.

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CERTIFIED FINANCIAL PLANNER

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OVERVIEW

What is the CFP Certification?

The Certified Financial Planner (CFP) is a US-based course. FPSB Ltd holds the licensing authority for CFP marks in India. For anyone seeking a rewarding career in Personal Finance, Banking, Finance, or Insurance, the CFP certification opens exceptional opportunities.

ELIGIBILITY

Any individual who has passed HSC or equivalent or has completed graduation can appear for CFP certification even before completing your Graduation.

EXAMINATIONS

Exams are conducted every month at NSE and FPSB. Candidate can also appear the exam online. The exam is conducted in the 3rd week of the month.

DURATION

Complete within 12-14 months. Classes held once or twice a week, more for working professionals or students.

EXAM FORMAT

All MCQ questions with no negative marking. For first 3 levels its 75 questions and for Level 4, 25 questions based on case study and 25 other MCQs

Why CFP Stands Apart

- Rated "One of the Best Jobs" – U.S. News & World Report 2012
- Rated Gold Standard by The Wall Street Journal
- Recognised in 27+ countries: USA, UK, Canada, Germany, Singapore and more
- Supported & preferred by 48 organisations in the BFSI industry
- Global pass rate of 70-75% with a flexible exam schedule
- Only ~3,500 CFPs in India as on 2025-26 — huge scope ahead

CAREER PATHS

Job Opportunities

CFP certification opens doors across the full spectrum of financial services:

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

LEVEL 1 Investment Planning Specialist

Personal Financial Management	Investment Planning & Asset Management	Regulatory Environment & Compliance
– Client Financial Situation – Time Value of Money – Cash Flow Demands & Conflicts – Budget & Emergency Fund – Debt & Financing Alternatives – Financial Management Services	– Asset Classes & Securities – Pooled Investment Products – Principles of Investment Risk – Investment Performance Management – Investment Theory – Asset Allocation – Wealth Management – Behavioral Finance – Objectives, Constraint & Suitability	– Client Best Interest – Economic Environment – Social and Political Environments – Compliance and Implications – Anti-Money Laundering

LEVEL 2 Retirement & Tax Planning

Retirement Planning	Tax Planning / Optimisation
– Retirement Principles – Retirement Objectives – Needs Analysis & Projections – Sources of Retirement Cash Flow – Cash Flow & Withdrawal – Projections and Strategies	– International Taxation – Cross-Border and Source Rules – Tax Strategies – Accounting Standards and Research

LEVEL 3 Risk and Estate Planning

Risk Management	Estate Planning
– Principles – Risk Exposures – Intro to Insurance – Insurance Company / Advisor Selection – Strategic Solutions	– Estate Planning Terminology – Wealth Distribution Goals – Estate Planning Process – Transfer During Life and at Death – Planning for Incapacity – Estate Planning Strategies

LEVEL 4 Advanced Financial Planning (Final Level)

The Financial Planning Process	Engaging Clients for Life	Developing Effective Financial Plans
- Financial Planning Process - Practice Standards - Professional Skills - Client Characteristics - Client Engagement and Communication - Critical Thinking	- Introduction to the Discovery Process - Appreciative Inquiry - Discovery Process Applied - Goal Determination, Refinement and Setting - Develop Financial Planning Recommendations - Presenting Recommendations to Clients	- Financial Planning Overview - Financial Plan Elements - Developing Effective Plans - Sample Financial Plans - Financial Plan Assessment

COURSE INVESTMENT

Approximate Course Costs (Regular Pathway)

Particulars	Approx. Amount (Rs.)
FPSB Registration Fees (1-year validity)	18,000 /-
Study Material Fees (All 4 Levels) *	24,075 /-
Exam Fees (Levels I - III) *	24,000 /-
Specialist Certification Fees*	11,000 /-
Psychology Course*	5,000 /-
Exam Fees (Level IV) + Financial Planning Assessment	25,000 /-
Tuition Fees	36,000 /-
Total Approximate Cost	1,43,075 /-

*Note:

- Study material cost of first 3 levels after discount is Rs. 5025/- per level and last level is Rs. 9000/-. (All material cost mentioned is after 33% discount from our end)
- Exam fees for first 3 levels is Rs. 8000 per level.
- Specialist certificate is to be mandatorily bought before registering for Final Level 4 CFP exam.
- Register for Psychology course after registering for level 4.
- Annual certification fees of Rs. 11,000 applicable for retaining membership with FPSB Ltd, US.
- The Tuition fees mentioned above is for live online lectures. The fees for RECORDED MODE is Rs. 27,000/-.

WHAT YOU GET

Amenities Included

1. Live lecture recordings for revision at your own pace.
2. Physical study material provided for all levels.
3. Personal doubt-solving sessions with the faculty.
4. Internal test before approving exam appearance.
5. Sessions enriched with practical examples, demonstrations, and theoretical studies.

KEY INFORMATION

Important Points

- Candidates can pursue the full CFP or choose specialist certifications via AMFI, IRDAI, and SEBI.
- Exams are conducted on 3rd week of every month for first 3 levels and for the 4th level they are conducted on every alternate month.
- The results are announced as per psychometric approach followed for all international professional qualifications
- Each level carries Individual Recognition in the job market.
- Registration is valid for 1 year.

GET STARTED TODAY

Ready to Enrol Now?

Take the first step towards a rewarding career in financial planning.
Get in touch with us to learn more or to begin your enrolment process.

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