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**FINANCIAL PLANNING STANDARDS BOARD**

Are you  
ready  
for a  
**Global  
Financial  
Career**



**FPSB® Integrated Financial Planning course**



**FPSB® Investment  
Planning Specialist**



**FPSB® Retirement &  
Tax Planning Specialist**



**FPSB® Risk & Estate  
Planning Specialist**

# IIFC is a Authorized Education Provider of FPSB US for CFP Coaching In India

Mr. Harminder Garg CFP<sup>CM</sup> is a Founder & Chief Mentor in IIFC. He has worked in the corporate sector for 18 years in leading brands like ICICI, HDFC & FPSB India. His sales & academics blended experience help him to guide students on a practical case study-based approach. 353+ candidates passed CFP Certification under his guidance with a success strike ratio of 71%.



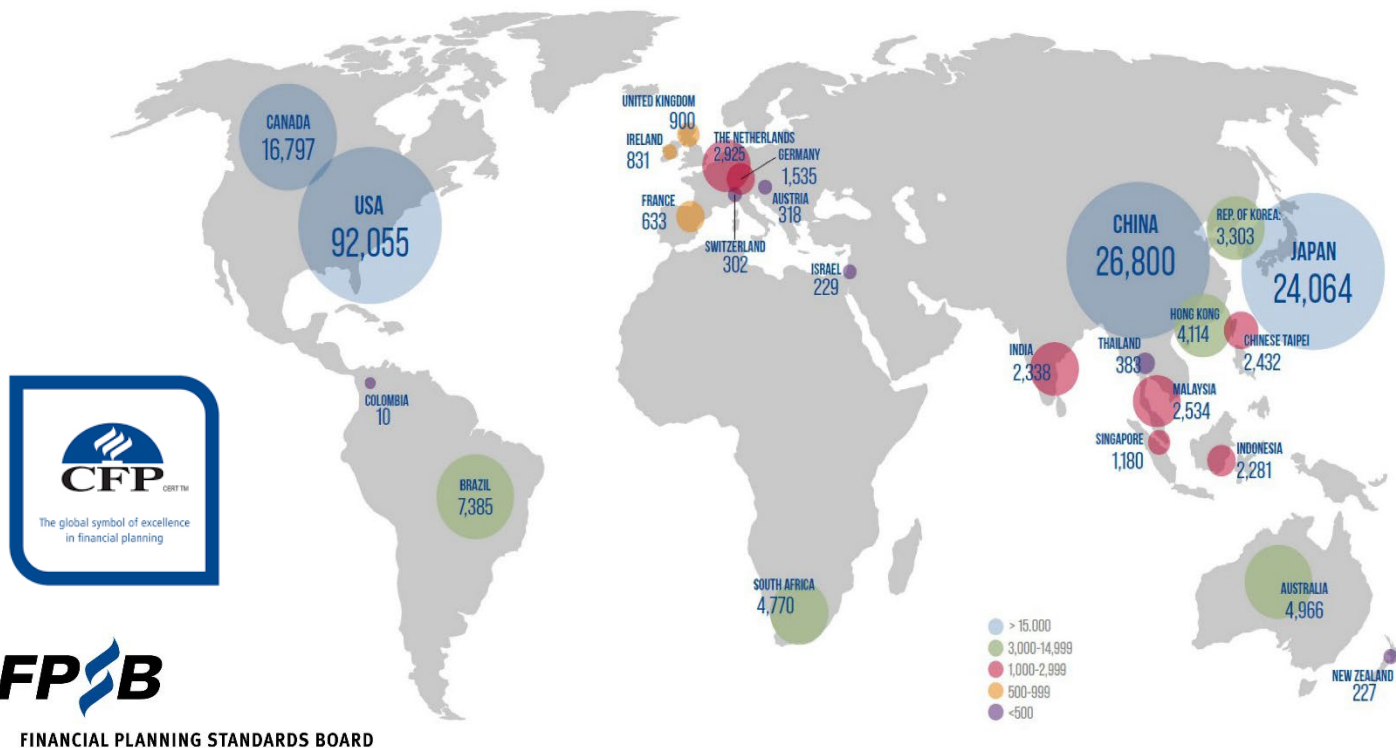
He has cleared the CFP Certification in the year 2007. He has done Executive PGDM in finance from IMT Ghaziabad, PG in Financial Advising from IIBF, and NISM Investment Advisor Level 1 (XA) & NISM Advisor Level 2 (XB) and Retirement Advisor Module. All Sessions of this module will be conducted by Mr. Harminder Garg CFP<sup>CM</sup>.

**IIFC is a ISO 21001 Certified for Educational Organization from IAF**

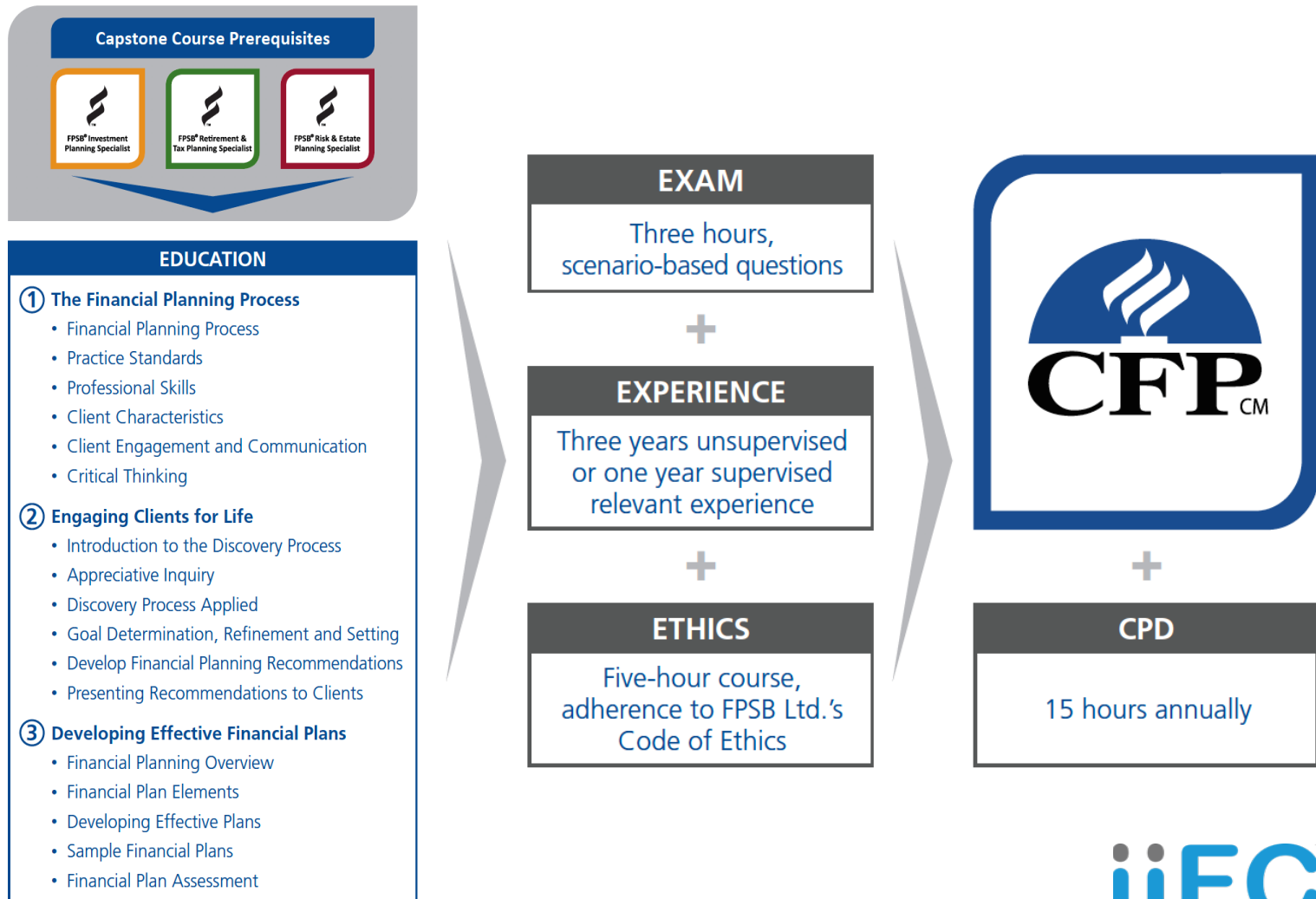


# 2,23,770 CFP Professionals Worldwide in 27 Territories

## CFP Professionals by Territory



# CERTIFIED FINANCIAL PLANNER<sup>CM</sup> Certification



# How is then a candidate advanced to write the CFP exam?

- The culmination of Integrated Financial Planning course lies in a candidate constructing a hypothetical financial plan and submitting the same to FPSB for assessment. It is only after a successful assessment of the submitted financial plan that a candidate is advanced to write the CFP exam.

FPSB will allocate Mentor to every Student in last module who is a expert the Financial Advisory & Mentor is guiding you on practical aspects of Financial Advisory



# Modules Covered in CFP Program



In CFP Final Exam – There is a one case study and from that case study 25 Multiple choice questions will be asked. These 25 questions is from six components of Financial Planning, viz. Risk Management and Insurance Planning, Estate Planning, Investment Planning and Asset Management, Retirement Planning, Tax Planning, and Personal Financial Management.

# Experience

3 Year Experience in Financial Services Industry

Such experience shall be in one of the following broad job activities

- (a) Funds Management or Investment Advice
- (b) Accounts or Auditing
- (c) Corporate Finance
- (d) Customer Interface/Relationship/Investor Service
- (e) Academics

## Fast track Pathway – In Brief

Professionals in Financial services having Specified

- (a) Education Qualification (details given in next slide), and
- (b) Relevant three years work experience

Would be eligible to register, upon verification of their credentials, in the FPSB Integrated Financial Planning course ( CFP Final – 4<sup>th</sup> Level)

Once registered for the IFP ( CFP Final – 4<sup>th</sup> Level) course, every Challenge status pathway candidate shall be at par with a regular candidate and shall follow the same pattern of Education, examination and certification to qualify CFP Final Case study Project & Exam.



## Eligibility for Fast track Pathway (Any One)

- MBA or PGDM from an AICTE approved Institute
- MA Economics or Master of Commerce (M Com)
- Chartered Accountant, from ICAI India or ACCA or CA Inter with 3 years Articleship
- CFA, USA or AICPA (USA) or CMA or ACCA
- Advanced Wealth Management Course or CAIB, from IIBF
- Post – Graduate Certificate program in Finance, PGDFM or other equivalent courses offered by IIM
- Fellow member of Insurance Institute of India (LI/GI)

# FPSB Fee for Fast track Pathway

FPSB Registration Fee

- Rs. 5000- Document Verification Fee
- 34000 - (Including Online Material Access Fee for All Modules)

FPSB Financial Plan Assessment fee & Exam Fee

- Financial Plan review fee – Rs. 10,500
- CFP Final Exam fee – Rs. 13,000

IIFC Fast track pathway coaching fee - Rs. 35K

## CFP Challenge pathway Course IIFC & FPSB Payment Plan in Rs.

IIFC fee on registration to dispatch study material	1 June 2024 - CFP Coaching Fee 1st Installment	1st Aug 2024 - CFP Coaching Fee 2nd Installment	1st Sept 2024 - FPSB Doc Verification fee	15th Sept 2024 - FPSB Reg. Fee	1st Oct 2024 - FP Review Fee & CFP Final Exam Fee	Total
2,000	15,500	17,500	5,000	34,000	23,500	97,500

# Virtual Classes for Fast track Pathway

Time Value of Money – Goal Planning 5 sessions (Evening)

*Tue & Sat 8 pm to 9.30 pm  
4<sup>th</sup> June, 8<sup>th</sup> June, 11<sup>th</sup> June, 15<sup>th</sup> June & 18<sup>th</sup> June*

16 Live Sessions on Concept Building of Financial Planning Components  
Income Tax, Estate Planning, Risk Planning, Retirement Planning and Investment Planning

*Tue & Sat 8 pm to 9.30 pm evening  
Starting from 25<sup>th</sup> June 2024 till 20<sup>th</sup> August 2024.*

Live sessions on CFP Final Exam -  
Exam date Exam date 22<sup>nd</sup> Oct 2024

*25<sup>th</sup> August 2024 to 20<sup>th</sup> Oct 2024*  
➤ *Sunday 3 pm to 4.30 pm*  
➤ *Thursday 8 pm to 9.30 pm*

Live Financial Plan Preparation Sessions

*3<sup>rd</sup> Nov 2024 to 8<sup>th</sup> Dec 2024*  
➤ *Sunday 3 pm to 4.30 pm*  
➤ *Thursday 8 pm to 9.30 pm*

***New Batch is going to start from 4<sup>th</sup> June 2024***

# IIFC Learning Portal

Online Tests

Weekly Online test conducted on Friday

Study Material

We will send Module wise Study Material Courier to you

Recording of Sessions

We will give access of IIFC learning portal to watch recorded session multiple times



**GROW. LEAD.**  
**EMPOWER.**  
SET YOURSELF APART



THIS IS TO CERTIFY THAT

## Indian Institute for Financial Certifications (IIFC)

has been approved as an authorized education provider  
for the CFP<sup>CM</sup> certification program in India by  
**Financial Planning Standards Board Ltd.**

CERTIFICATE VALID UNTIL: 31 March 2024



FINANCIAL PLANNING STANDARDS BOARD

A handwritten signature in blue ink that reads 'Dante De Gori'.

Dante De Gori *Chief Executive Officer*  
FINANCIAL PLANNING STANDARDS BOARD LTD.

FPSB<sup>TM</sup>, FP&B and the certification marks CFP<sup>TM</sup>, CERTIFIED FINANCIAL PLANNER<sup>TM</sup>, and  are owned outside the U.S., including in India, by Financial Planning Standards Board Ltd.



# Convocation Ceremony at Delhi with FPSB Global CEO Mr. Noel Maye



IIFC is a FPSB US Authorized Education Provider for CFP Certification Program in India

## 37 NEW CFP'S QUALIFIED in April 2023 through IIFC Coaching



**Harminder Garg CFP<sup>CM</sup>**  
Founder & Chief Mentor



BY THIS ADDITION,  
TOTAL 273 CANDIDATES QUALIFIED  
THROUGH IIFC COACHING

**81%** 37 out of 46 Candidates passed  
CFP Final Exam in the first attempt in April 2023

**Congrats!**

 <b>AKASH CHATTERJEE</b> Sr. Partner- Golden Arrow Global LLP, Kolkata	 <b>ANANT HARICHANDAN</b> Manager - HDFC AMC, Mumbai	 <b>ANMOL KUMAR GUPTA</b> MFD - AKG Financial, Jammu	 <b>BARKHA JAIN</b> RM - ICICI Pru MF, VADODARA	 <b>CA BIRINDER JOLLY</b> Chandigarh	 <b>DEBIDATTA DASH</b> Wealth Specialist - Axis Bank, Bhubaneswar	 <b>DHRUTI SHAH</b> Content Writer - Skillspire, Ahmedabad
 <b>DIKSHA SETHI</b> Partner - V2U Financials, Faridabad	 <b>FRANKY N FERNANDES</b> Financial wellness Coach, Hyderabad	 <b>K C PATTNAIK</b> BM - Franklin Templeton MF, Guwahati	 <b>KAJALKUMAR ROY</b> Founder - IntelliQa Academy, Vadodara	 <b>MEETIKA ARORA</b> Chief Manager HDFC MF, Gurgaon	 <b>NISHIKANT LOHE</b> MFD & AP Matlial Oswal, Pune	 <b>NITHIN JOY</b> BM - HDFC AMC, Kerala
 <b>PRAGATHI R. ARCOT</b> MT - Shree Sidvin Financial Services, Bangalore	 <b>PRASHANT VJAYKUMAR</b> Consultant - Genpac, Pune	 <b>PRITI BHANUSHALI</b> Accountant-Spectrum Prints, Mumbai	 <b>ROHIT KOTWAL</b> Partner - Burgundy Private, Axis Bank, Ludhiana			
 <b>SAMMED TIRTHARAJ KHOT</b> Sr. Auditor -S & T Ass., Pune	 <b>SHAILLY SETHI</b> Founder -12 Months, Varanasi	 <b>SHAINA GULATI</b> Co-Founder - Bodhi Tree Wealth, Chandigarh	 <b>SHILPA GOLE</b> Founder - NerdyBird Financial Wellness, Ahmedabad	 <b>SHIVAM NIGAM</b> RM - ABSLMF, Mumbai	 <b>SUJIT SADANGI</b> TM - TATA AIA Life, Pune	 <b>SUNEEL DUTT</b> Chief Manager - PNB, Chandigarh
 <b>SURABHI RAVINDRAN</b> AVP - WhiteOak Capital AMC, Hyderabad	 <b>TANUSHRI SINGH</b> RM - Bajaj Capital Ltd, Gurgaon	 <b>UTKARSH GARG</b> Ass. Manager - WhiteOak Capital AMC, Hyderabad	 <b>VARUN ARORA</b> Sr. Manager HDFC MF, Amritsar	 <b>VISHAL RAMKRISHEN</b> Trainer - Option Gurukul, New Delhi	 <b>VIVEK SINGH</b> Sr. Manager - Invesco Mutual Fund, New Delhi	 <b>YAGYESH DWIVEDI</b> CEO - Wealth Asia IMF, Delhi



**Harminder Garg CFP<sup>CM</sup>**  
Found & Chief Mentor

**85%** 37 out of 44  
CANDIDATES PASSED  
**CFP Financial Plan Assessment**  
Project in the first attempt in  
March 2023

 Akash Chatterjee	 Anmol Gupta	 Anoop Sood	 Brinder S Jolly	 Barkha Jain
 Dharmveer Sachan	 Dhruvi Shah	 Diksha Sethi	 Debidatta Dash	 Franky N Fernandes
 K C Pattnaik	 Kajalkumar Roy	 Manoj Yadav	 Mayuri Shrivastava	 Meetika Arora
 Mitesh Yajurvedi	 Nithin Joy	 Payal Ray	 Poornima V	 Pragathi R. Arcot
 Rohit Kotwal	 Sanjay Kumar	 Shally Sethi	 Shaina Gulati	 Shane Arora
 Shilpa Gole	 Suneel Dutt	 Surabhi R	 Tarang Pal	 Utkarsh Garg
 Varun Arora	 Vishal R	 Vishal Shrivastava	 Vivek Singh	 Yagyesh Dwivedi

Congratulations

9 out of 10 Challenge pathway Candidates passed CFP Financial Plan Assessment Project in the first attempt in March 2023

New Batch is going to start from 7th April 2023

Please register on above link for 1-hour free online session on CFP Certification

Call us on  
**82838-42598**  
harminder.garg@iifcedu.in  
www.iifcedu.in



# Challenge Pathway



23 out of 65 candidates passed

CFP Exam through Challenge Status pathway



**Rahul Daga**  
Chief Manager  
PNB, Mumbai



**Manu Vishal**  
VP - Axis Bank  
Ahmedabad



**Ankit Patel**  
Investment Officer  
SBI Wealth, Ahmedabad



**Sanjay Kumar**  
DGM - SBI  
Chandigarh



**Poornima V**  
VP - 360 Wealth  
Bangalore



**Manisha Pattnaik**  
Ass. Manager - HDFC AMC  
Cuttack



**Nipun Dhariwal**  
DM - ICICI Pru MF  
Indore



**Sunita Chourasia**  
NRI RM - HDFC Bank  
Bangalore



**Prashanth Kumar A**  
BA - MOFSL  
Bangalore



**Chetan Reliawala**  
MFD  
Surat



**Shantanu Shrivastava**  
VP - Axis Bank  
Pune



**Sanjeev Sharma**  
Co-Founder - Sqrrl  
Fintech, Gurugram

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# Challenge Pathway



“IF you prioritize knowledge and intelligence money will continue to come” - Wilson Law



**Pradeep Maithani**  
AVP - Axis Bank Ltd.  
Shimla



**Sushant Bandewar**  
WM - Phillip Capital India  
Navi Mumbai



**Prameela Nippani**  
SSM - Franklin Templeton  
Hyderabad



**Amit Yadav**  
Ass. Manager-HDFC AMC  
Varanasi



**Vinay Chaudhary**  
Financial Planner  
Indore



**Gurpreet Kaur**  
Manager - Axis Bank Ltd.  
Ludhiana



**Sameer Divekar**  
Ops Head - Dolat Capital Market  
Pvt. Ltd., Mumbai



**Gaurav Kumar Gupta**  
Director - HMG Capital  
Services, Delhi



**Satyajeet Das**  
BH - Solidarity  
Investments, Pune



**Raghupreet S Kanwar**  
Founder - Bright Wealth Ideas  
Hyderabad



**Sumit Goyal**  
Chief Manager  
Axis Securities, Mumbai

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# IFA's



Independent Financial Advisor's/Business Owners upgraded their skill set by passing CFP Certification Exam in Oct 2023



**Sachin Garg**  
Partner-GPS Financial Services, Bathinda



**Bharat Bahl**  
Founder, Immaculate Trainers, Amritsar



**CP Joshi**  
Founder & CEO Cortizen Business Services LLP, Faridabad



**Deepak Soni**  
MFD Indore



**Vishal Khurana**  
MFD GRD Financial Services



**CA Dimple Paras Momaya**  
Prop - D.P. Momaya & Co. Sangli



**Manmeet Kaur**  
Financial Consultant Gurugram



**Ravinder Kumar**  
Partner-BDS Financials Services & Risk Management, Amritsar



**Bhasker Tiwari**  
Director-Univesto Capital, Mumbai



**Anand Kumar**  
Independent Advisor Bangalore



**Puneet Chandra**  
MD- Sivana Insurance Brokers, Delhi



**Harsh Gupta**  
Director - GKG Investments, Delhi



**Nivedita Garg**  
Co-Founder-Nile Investment Services, Ludhiana



**Anusha C K**  
MFD - Ancaps Finserve, Bangalore



**Mrigank Gupta**  
Founder-Dhan Prabhaaar Pvt. Ltd., Noida

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# Wealth Managers



Clients want Qualified Wealth Manager who can generate Advisor's Alpha

Relationship Managers passed CFP Exam in October 2023



**Adarsh Nath**  
RM - HDFC AMC Patiala



**Priyanka Tickoo**  
Key Account Manager Bajaj AMC, Delhi



**Jaspreet Singh**  
Manager-Whiteoak Capital AMC, Delhi



**Avani Shah**  
WM - Ocean Finvest Ahmedabad



**Vinod Kumar Karra**  
ASM - Whiteoak Capital AMC, Hyderabad



**Udit Sharma**  
NRI RM - HDFC Bank New Delhi



**CA Shreya Ranka**  
BA - RevGurus Info India Indore



**Jaydeep Jariwala**  
Manager - Whiteoak Capital AMC, Surat



**Gazal Harlalka**  
IC - Motilal Oswal Private Wealth, Bangalore



**Rahul Singh**  
Domain Expert - TCS Kolkata



**Adya Sanket Ray**  
Ass. Director - HDFC PBG Bangalore



**Pankaj Kumar**  
Manager - UTI MF Kolkata

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# IIFC – Authorized Education Provider of FPSB US



**Harminder Garg CFP®**  
Founder & Chief Mentor - IIFC

# 65

**CANDIDATES**

**Passed CFP Exam with a success strike ratio of 75%**

**In October 2023 through IIFC Coaching till date 303 candidates passed CFP Exam under guidance of CFP Certification Mentor Harminder Garg**

**82838-42598**

[harminder.garg@iifcedu.in](mailto:harminder.garg@iifcedu.in) [www.iifcedu.in](http://www.iifcedu.in)



## Team Leaders



**“Only the people who take learning, growth and skill development into their own hands will be tomorrow’s leaders”**

**Team Managers Working in BFSI sector passed CFP Exam in Oct 2023 to guide & nurture team members and Channel partners in a more effective way**



**Ramya Udayan**  
ZSH - South Indian Bank, Kerala



**Abhishek Chatterjee**  
Team Head-ICICI Securities PWM, Mumbai



**Pankil Thakkar**  
Sr. VP - PGIM India MF Ahmedabad



**Amruta Tipnis**  
AVP - Multi-Act Mumbai



**Shivani Mathur**  
BM - IndusInd Bank Gurgaon



**Chetan Mehta**  
BM-Franklin Templeton AMC Senior Branch Manager Rajkot



**Devesh Srivastava**  
VP - Axis Bank Mumbai



**Prateek Mittal**  
RH-ICICI Bank Regional Head, Hyderabad



**Pranay Chadha**  
Sr. AVP & Cluster Head Bajaj Capital Ltd, New Delhi



**Sunil Kumar Pandey**  
Sr. Manager - HDFC MF Haldwani



**Arghya Duttgupta**  
BH - Corporate & Institutions HDFC AMC Ltd, Mumbai

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Thank You

