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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^{CM} 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%.



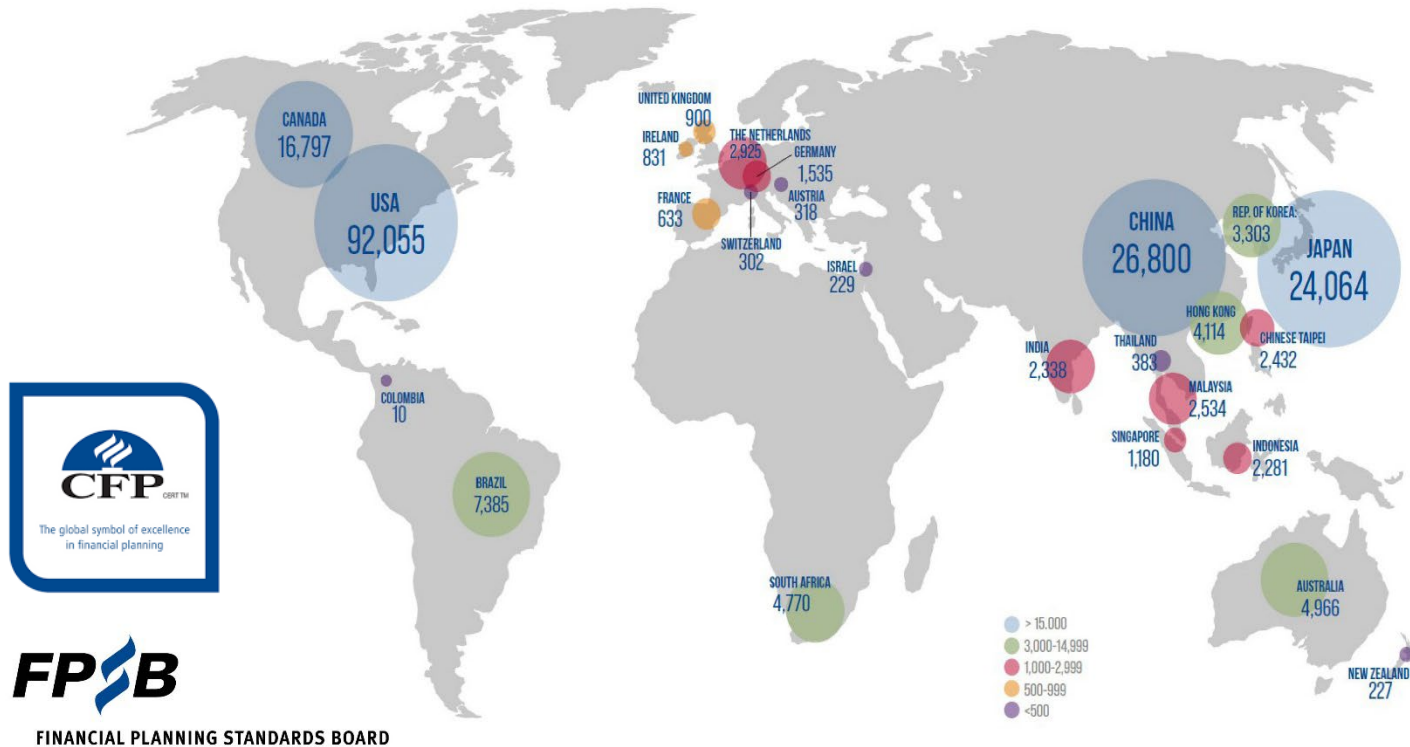
He has cleared the CFP Certification in the year 2007. He has done Executive PGDM in finance from IMT Ghaziabad, PG in Financial Advising from IIBF, and NISM Investment Advisor Level 1 (XA) & NISM Advisor Level 2 (XB) and Retirement Advisor Module. All Sessions of this module will be conducted by Mr.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

IIFC is a ISO 21001 Certified for Educational Organization from IAF



2,23,270 CFP Professionals Worldwide in 27 Territories

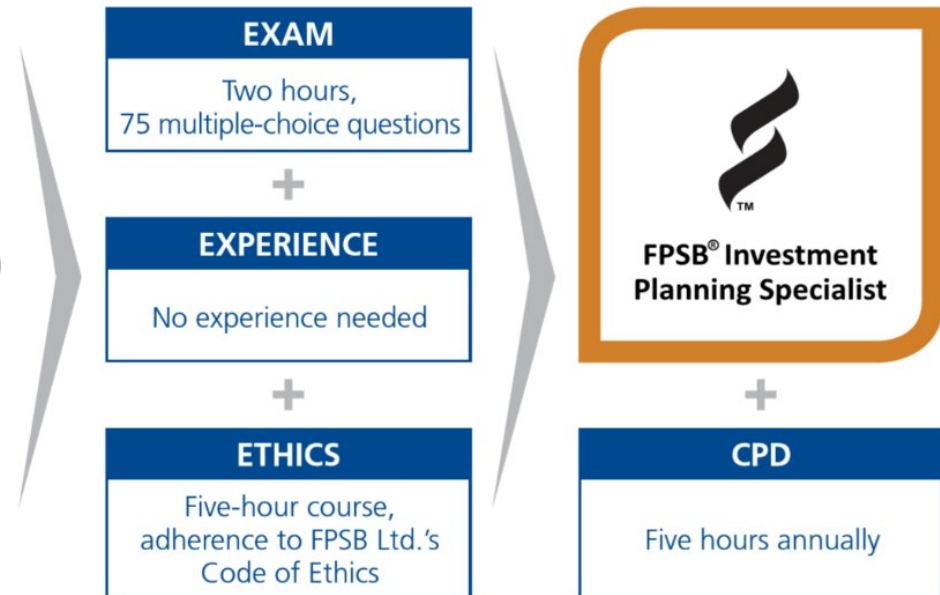
CFP Professionals by Territory



FPSB® Investment Planning Specialist

EDUCATION

- 1 Personal Financial Management**
 - Client Financial Situation
 - 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



FPSB® Retirement and Tax Planning Specialist

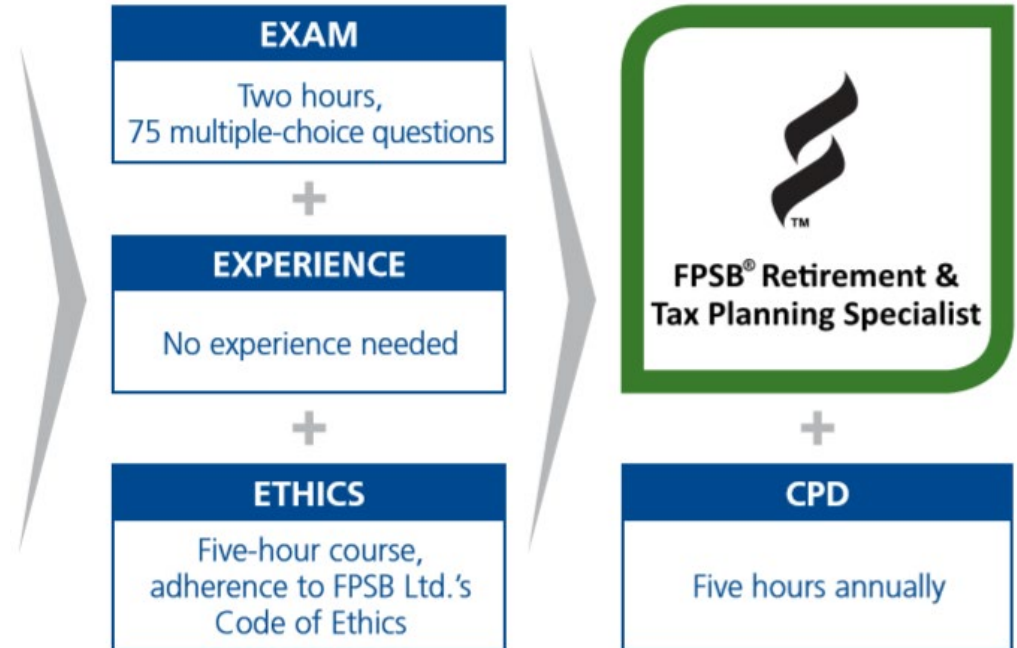
EDUCATION

① **Retirement Planning**

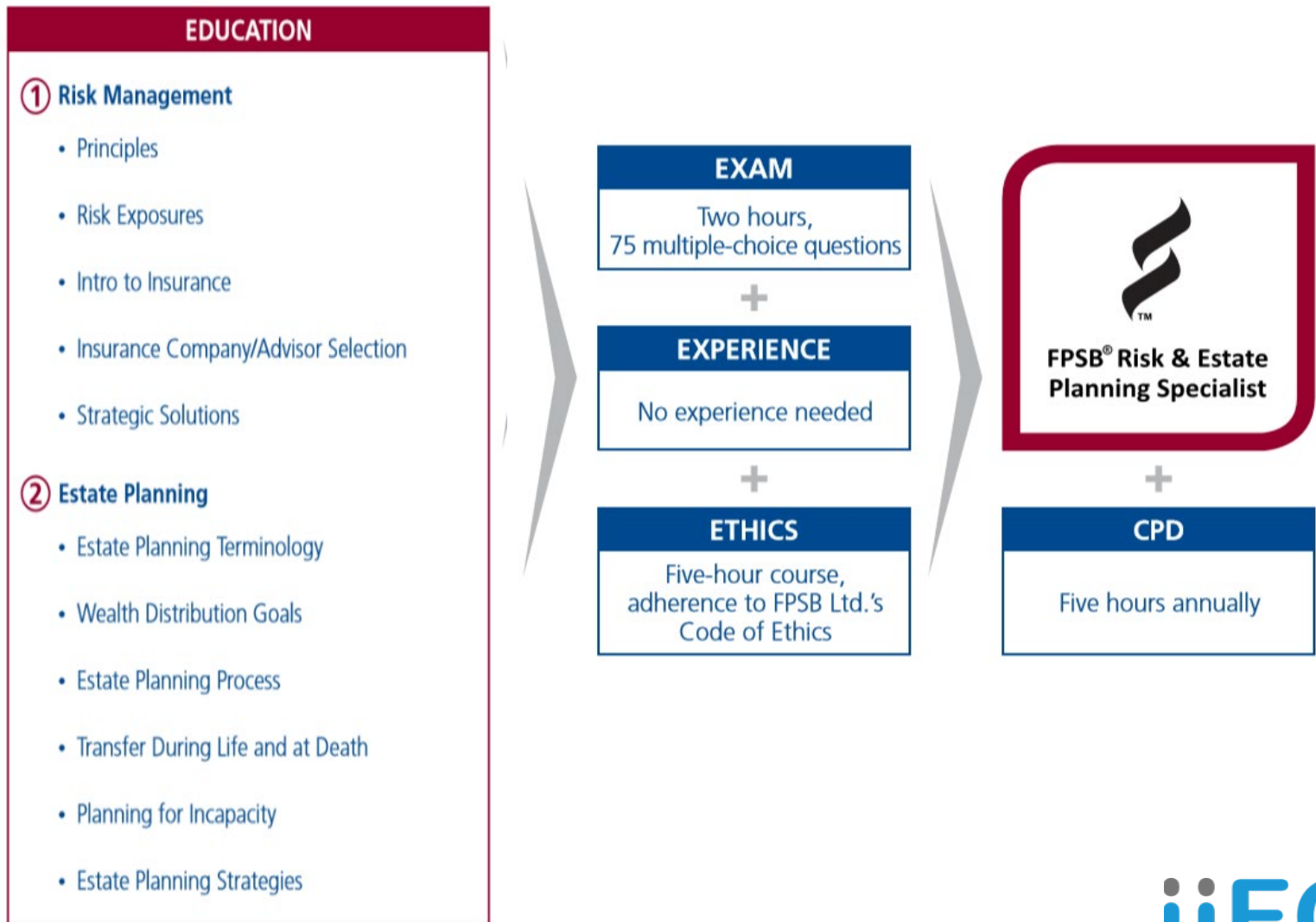
- Retirement Principles
- Retirement Objectives
- Retirement Needs Analysis and Projections
- Sources of Retirement Cash Flow
- Retirement Cash Flow, Withdrawal Projections and Strategies

② **Tax Planning / Optimization**

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



FPSB® Risk and Estate Planning Specialist



FP&SB™ Investment Planning Specialist

THIS IS TO CERTIFY THAT

having satisfied the education, examination and ethics requirements for certification and having agreed to abide by the Code of Ethics is hereby authorized to use the FP&SB™ Investment Planning Specialist designation in India, with all rights and privileges pertaining thereto and subject to periodic renewal requirements as established and amended from time to time.

Certification Number: | Expires:


Noel Maye Chief Executive Officer
FINANCIAL PLANNING STANDARDS BOARD LTD.


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Financial Planning Standards Board Ltd. is the owner of the FP&SB™ and FP&SB marks in India. These marks, together with the CERTIFIED FINANCIAL PLANNER™ mark, are owned and used outside the U.S. by Financial Planning Standards Board Ltd.

FP&SB™ Retirement and Tax Planning Specialist

THIS IS TO CERTIFY THAT

having satisfied the education, examination and ethics requirements for certification and having agreed to abide by the Code of Ethics is hereby authorized to use the FP&SB™ Retirement and Tax Planning Specialist designation in India, with all rights and privileges pertaining thereto and subject to periodic renewal requirements as established and amended from time to time.

CFP Certification Number: | Expiration Date:


Noel Maye Chief Executive Officer
FINANCIAL PLANNING STANDARDS BOARD LTD.


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FP&SB™ Risk and Estate Planning Specialist

THIS IS TO CERTIFY THAT

having satisfied the education, examination and ethics requirements for certification and having agreed to abide by the Code of Ethics is hereby authorized to use the FP&SB™ Risk and Estate Planning Specialist designation in India, with all rights and privileges pertaining thereto and subject to periodic renewal requirements as established and amended from time to time.

CFP Certification Number: | Expiration Date:



Noel Maye Chief Executive Officer
FINANCIAL PLANNING STANDARDS BOARD LTD.


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CERTIFIED FINANCIAL PLANNER™

THIS IS TO CERTIFY THAT

having satisfied the education, examination, experience and ethics requirements for certification and having agreed to abide by the Code of Ethics and Professional Responsibility and Financial Planning Practice Standards is hereby authorized to use the  and CERTIFIED FINANCIAL PLANNER™ marks in India, with all rights and privileges pertaining thereto and subject to periodic renewal requirements as established and amended from time to time.

CFP™ Certification *Global excellence in financial planning*

Certification Number: | Expires:


Noel Maye Chief Executive Officer
FINANCIAL PLANNING STANDARDS BOARD LTD.

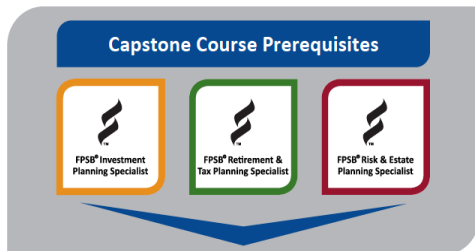

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FP&SB™, FP&SB and the certification marks CFP™, CERTIFIED FINANCIAL PLANNER™, and  are owned outside the U.S., including in India, by Financial Planning Standards Board Ltd.

3 Specialist Certifications & CFP Professional Certification


INDIAN INSTITUTE FOR
FINANCIAL CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER^{CM} Certification



- 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

EXAM

Three hours,
scenario-based questions

+

EXPERIENCE

Three years unsupervised
or one year supervised
relevant experience

+

ETHICS

Five-hour course,
adherence to FPSB Ltd.'s
Code of Ethics



+

CPD

15 hours annually

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



Exam Level 1 to 3

Option to give exam through : Computer Based Proctored mode & NSE Centre's across India

Multiple Choice – 75 Questions

2 hour Exam conducted on 3rd week of month

Excel based software access allowed

Exam Level 4 Final CFP Module

3 hour Exam – NSE Centres

Multiple Choice – Case Study based Exam

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

1 year Supervisory experience with any Practising CFP post completion of all modules

In regular pathway You can clear all Level's without complying experience requirements. However before CFP Certification you have to complete experience req.

FPSB Fee Structure for Regular pathway

Registration Fee	Rs. 18000
FPSB LMS Access	Level 1 to 3 – Rs. 6500 each & Level 4 – Rs. 13000 Total - 32500
Exam Fee	Level 1 to 3 – Rs. 6750 each Final Exam & Financial Plan review fee – Rs.23500 FPSB Certification Fee for all four Cert. – Rs. 8600 Total – Rs.52350
Total Cost: Rs. 18,000+ 32500+52350 =1,02,850	

IIFC Coaching Fee – Virtual Classes

**CFP Course –
Regular Pathway**

3 Instalments of Rs. 20K each : Total Rs. 60K

You can book your seat by 2K payment & we will send you study material. 1st Instalment due on 1st June – 18K and 2nd Instalment of Rs. 20K will due on 1st Aug 2024 and 3rd instalment of Rs. 20K will due on 1st Sept 2024

Discount Coupons

IIFC will issue discount coupons worth (Rs. 16,250) applicable to get discount in FPSB LMS fee. For first 3 modules – Discount on FPSB LMS fee is Rs. 3250 each and for 4th module applicable discount is Rs. 6500.
FPSB Fee– Rs. 1,02,850 less discount 16250 =Rs. 86,600

Total Cost: Rs.86,600 FPSB and Rs.60,000 IIFC = Rs. 1,46,600

CFP Course IIFC & FPSB Payment Plan in Rs.

On Registration to dispatch study material	1 June 2024 - CFP Coaching Fee 1st Installment	1st July - FPSB Reg. Fee& first module reg. fee	1st Aug - FPSB 1st Exam Fee & 2nd Ins. of Coaching Fee	1st Sept 3rd Ins. of Coaching Fee & FPSB 2nd Mod. Reg. Fee	1st Oct - 2nd Module Exam Fee	1st Nov 2024 - FPSB 3rd Mod. Reg. Fee	1st Dec 2024 - 3rd Module Exam Fee	1st Jan 2025 - 4th Module Reg. Fee	1st March 2025 - FP Review Fee & CFP Final Exam Fee	Total
2,000	18,000	21,250	26,750	23,250	6750	3250	6750	15,100	23,500	1,46,600

Virtual Classes for Regular pathway first 3 Levels

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

Tue & Sat 8 pm to 9.30 pm

4th June, 8th June, 11th June, 15th June & 18th June 2024

- Risk & Estate Planning from 25th June to 17th Aug 2024
- Retirement & Tax Planning from 25th Aug to 19th Oct 2024
- Investment Planning from 26th Oct to 21st Dec 2024 (after 3 module we will share Final 4th Module Schedule)

Saturday – 6.30 am to 8.30 am

Sunday – 7 am to 9 am

Wednesday – Eve 8 pm to 9.30 pm

New Batch is going to start from 4th 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^{CM} 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.

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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



Harminder Garg CFP^{CM}
Founder & Chief Mentor

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



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!

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



Harminder Garg CFP^{CM}
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 Sechan	 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 Prabhaar 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 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

