

iiFCTM

INDIAN INSTITUTE FOR
FINANCIAL CERTIFICATIONS

**Personal Finance
Mentorship Program
to significantly
boost your Career**



Where Good Becomes Great



**PERSONAL FINANCE
SPECIALIST**

www.iifcedu.in



IIFC (Indian Institute for Financial Certification) has been established to disseminate Financial Education to the aspiring individuals who are keen to make a career in Financial Planning and Wealth Management. **PFS Mentorship program** from **IIFC** is signature program designed to match the growing need of competent financial Advisors.



Harminder Garg
CFP Coach

Harminder Garg has **18 years' experience** in corporate sector out of which **10 years' experience in CFP Coaching** & corporate trainings. He has done **CFP in "A" Grade in year 2007** and also worked in **FPSB (CFP)** Board in Knowledge Management dept. for 2 years. He has done Executive PGDM in finance from IMT Ghaziabad, PG in Financial Advising from IIBF, NISM Investment Advisor (XA) & (XB) Certification & Retirement Advisor module certified.

270+
Candidates passed CFP Certification under his guidance with a strike ratio of 71%



Objective of Personal Finance Mentorship Program

All of you observed in recent days, there are lot of changes in regulatory & economic market scenario and all of such changes leads to higher expectation from Financial Advisors. Clients want to deal with only those financial Intermediaries who are providing Advisor's alpha. These coaching sessions focused on competency building & how to scale up advisory business.

1. **Guidance on how to pass regulatory certifications like NISM Investment Advisor Level 1 & Level 2 and Retirement Advisor Certification**
2. How to shift from Product centric Sales to Need based advisory approach
3. How to construct, analysis & review Investment portfolio
4. How to acquire new clients, Increase the wallet share and retain existing Clients

FOR WHOM



**Mutual Fund
Distributors**



**Insurance
Professionals**



**Employees of
Financial Services
Sector Companies**



**Finance
Students**



Time Value of Money Calculations

on Excel with Case Studies

6 Live Sessions of 90 minutes each

- Rate of return Calculation through IRR & XIRR function
- Case Studies on Education Planning & other goal calculations
- Personal Debt Restructuring Calculations
- Growing Annuity & Step-up SIP calculations
- Inflation adjusted rate of return calculation
- Six Steps of Financial Planning Proces
- How to do asset allocation & rebalancing in Goal based Investments



Estate Planning

2 SESSIONS



Importance of Estate Planning



Intestate Succession Rules



Role of Nominee & Joint Holder in Investments



Tools of Estate Planning Will & Private Trust



Income Tax Planning

3 SESSIONS of 90 minutes each

1

Computation of Individual tax liability

Important provisions of five heads of Income

2

3

Calculation of Capital gain of various Investment products

Set off & Carry Forward of losses

4

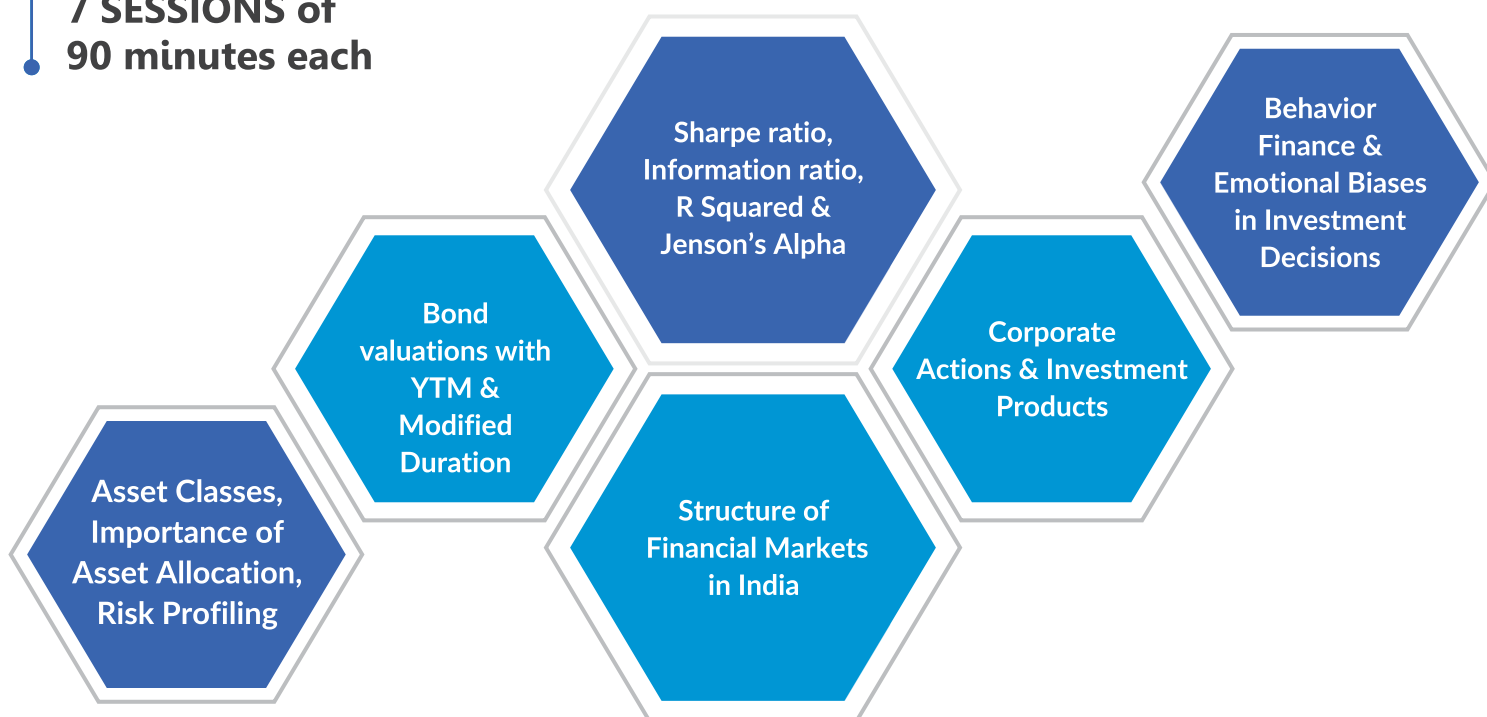
5

Deductions, Rebate & Exemptions



Investment Planning

7 SESSIONS of
90 minutes each





Retirement Planning

3 SESSIONS



Case Studies on how to do Retirement Planning

Role of EPF & NPS in Retirement Planning



NPS, SCSS & other Post Office Saving Schemes

Annuity & Pension Plans





Risk Management & Insurance Planning

2 SESSIONS

01

Basics of Risk Management Strategies

Role of Insurance in Risk Management

02

03

Insurance based Investment Products

Important concepts of Health Insurance

04



Financial Calculator & Tools

Provided Free of cost



Excel tool to
prepare complete
Financial Plan



Growing
SIP/SWP
Calculator



Income Tax
Computation
sheet in Excel



Retirement
Calculator



Risk Profiler
Tool



Standard
Will Format

Where Good Becomes Great

IIFC Achievers



Total **273** candidates Cleared **CFP Certification Exam** till date
(with a success Strike Ratio of **73%**) under guidance of



CFP Coach

Harminder Garg

**HYBRID
MODE**

6 Online Virtual Sessions
of 90 mins each
16 recorded sessions of 90 mins each



One session of 30 minutes
each every week for 8 weeks by
Harminder Garg

**PROGRAM
DURATION**



3 months
(37 hours)

**COURSE
FEE**



₹29,500/-
(Inclusive of GST)

Personal Finance Specialist Mentorship Certificate from IIFC

We will conduct online tests on fortnightly basis to understand the learning gaps and After training candidate has to clear Final online exam for "Personal Finance Specialist" Mentorship Certificate from IIFC.

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