

iiFC™

INDIAN INSTITUTE FOR
FINANCIAL CERTIFICATIONS

Personal Finance
Mentorship Program
to significantly
boost your Career



Where Good Becomes Great



PERSONAL FINANCE
SPECIALIST



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INDIAN INSTITUTE FOR
FINANCIAL CERTIFICATIONS

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.



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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.



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 diversify revenue streams like Estate Planning, Asset sourcing business
5. 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 Sessions of 2 hour 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
- Use of Goal Seek Function in Financial Planning
- How to do asset allocation & rebalancing in Goal based Investments



Estate Planning

2 SESSIONS



Importance
of Estate Planning



Intestate
Succession Rules



Role of HUF in
Estate Planning



Tools of Estate
Planning Will Nomination
& Private Trust



Income Tax Planning

4 SESSIONS

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

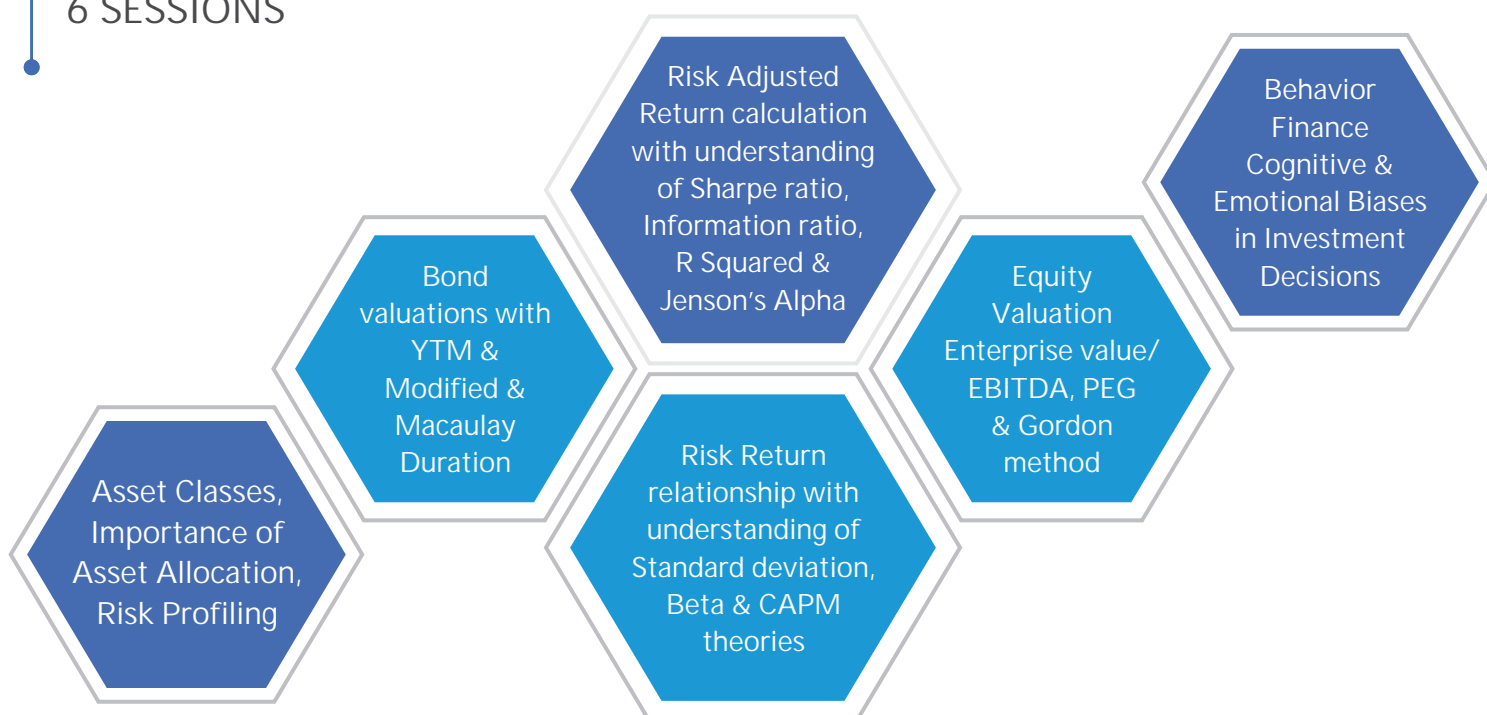
5

Clubbing of Income & Assessment of Income



Investment Planning

6 SESSIONS





Retirement Planning

3 SESSIONS



Case Studies on how to do
Retirement Planning

Annuity & Pension Plan's



EPF, PPF, NPS, SCSS &
other Post Office Saving Schemes

Retirement Bucket Strategy





Risk Management & Insurance Planning

3 SESSIONS

01

Human Life Value calculation with Need based
and Income based method

Types of Insurance based Investment products

02

03

Important concepts of Liability Insurance, Health Insurance

Key man & Employer-Employee Insurance Concepts

04



PERSONAL FINANCE
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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



PERSONAL FINANCE
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Jump start your career with
the world of opportunity

- 50 Hours + Recorded Sessions
- 6 Live (Virtual) Sessions of 1 hour each on fortnightly basis by Harminder Garg
- Every week Session to resolve doubts



DURATION

3 Months



PROGRAMME FEE

10,000/-

PFS Mentorship Program 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"



CFP Coach
Harminder Garg

CALL US ON

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