



iVentures Academy
of Business & Finance
Fueling your Aspirations

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Certified Financial Planner



Financial Planning Standards Board

Introduction

The iVentures Academy of Business & Finance (IABF) has been established under the benefaction of the iVentures Capital Group, which was founded in the year 2005. IABF envisions transformation of the way we approach education, especially in the field of Finance and is committed to impart world class education with an Advisory Board, consisting of members from diverse fields related to finance, and a team of professionals and faculty consisting of illustrious and veteran practitioners in the financial industry and academicians from reputed institutes. The institute is accredited to the FPSB India for CFP^{CM} (Certified Financial Planner) Certification education in India.

At IABF, we lay strong emphasis on comprehensive development of current & aspiring finance professionals after identifying their potential as per the industry requirements. Now it will be easy for anyone with/without financial background and experience to understand & pursue a career in the fastest growing financial planning sector.

The Course - CFP^{CM}

CERTIFIED FINANCIAL PLANNER^{CM} Certification is a mark of excellence granted to individuals who meet the stringent standards of education, examination, experience and ethics in financial sector. The CFP^{CM} Certification is the most recognized, prestigious and sought after Certification in the area of personal finance, wealth management & investment advisory profession across the globe. The course has been rated as the Gold standard by the Wall street journal.



Financial Planning

While future cannot be predicted, one can certainly be well prepared for it. All of us try to plan out our personal & professional lives in advance. In fact, financial planning requires a systematic scientific approach in which financial planner helps an individual to maximize his/her existing financial resources by utilizing financial tools to meet the goals at various stages of life.



Advantages of CFP^{CM}

This course opens up the world of opportunities like never before in the financial sectors. Organisations like recognized Banks, Wealth Management Firms, Financial Planning Companies, Asset Management Companies, Financial KPOs & Insurance Firms are always eager to look for people expert in this category.

In India there are more than 50 charter members, the biggest in the financial service industry who have endorsed CFP^{CM} Certification and are committed to give preference to CFP^{CM} Certificate holders in their recruitment. In addition, financial planners can also choose to establish their own financial planning firms.



What does a CFP^{CM} do?

The CFP^{CM} Certificate holder is a financial specialist whose prime objective is to guide its clients, determines his/her short, medium and long term financial aspirations and provides them unbiased advice to meet their financial objectives.

What you get in a nutshell?

- You will become the professional with the highest qualification in personal finance.
- Personal satisfaction of achieving the financial planning expertise.
- Better social status by joining the league of professionals
- Certificate recognized in more than 25 countries across the globe.

RECOGNITION - FPSB India

The CFP^{CM} Certification is monitored in India by the Financial Planning Standards Board, India. FPSB India is a public private enterprise and a professional standard setting body for Financial Planners in India and pro-actively guides the development and promotion of standards for financial planning professionals to benefit and protect the public in the country. It closely works with all the stakeholders, viz the Government, the Regulators, the Industries/Associations, Corporates, the Media and the General Public to achieve its objectives.



Courses

The courses offered by the IABF cover the full range of process, products & services related to financial markets. Our courses have been designed to meet the emerging demands of the industry.

We want to be known for our “Programs with a practical approach”.

Regular weekday classes

Weekend batches

Classroom accelerated

Distance learning

CFP^{CM} Curriculum

The CFP^{CM} Curriculum prescribed by FPSB is globally followed by all the education providers for CFP^{CM} Certification education program. There are more than 100 universities in the United States that offers this course in self study & regular classroom mode.

The curriculum consists of following six modules which need to be completed in order to fulfill the requirements of the CFP^{CM} Certification program.

- Introduction to Financial Planning
- Risk Analysis & Insurance Planning
- Retirement Planning & Employee Benefits
- Investment Planning
- Tax & Estate Planning
- Advanced Financial Planning

Junior Designation (AFP)

FPSB India awards a junior designation i.e. Associate Financial Planner (AFP) on the successful completion of any one module (Exam I, II, III or IV) to the applicant, until one completes all the formalities & procedures to get the final Certification from FPSB India. Meanwhile Certificate holder would be eligible to put Associate Financial Planner (AFP) against his/her name, on any name card.

Eligibility

- Undergraduates
- Graduates (in any stream) & Working professionals

FPSB Registration fee

CFP^{CM} aspirants are required to pay FPSB India a registration fee which is currently Rs 10,000 plus service tax (as applicable) which is valid for one year. All fees are subject to revision.

Exam Schedule & Pattern

CFP^{CM} exams are facilitated by NSE and conducted online on NCFM platform on NSE's examination centers and other NSE networked sites throughout India.

Our Deliverables in Classroom – Our training mode with options of Weekdays & Weekend classes

- 150 hours of classroom training spread over 5 months on weekends/weekdays
- Smart, Crisp and Simplified study material – 6 sets of text books covering detailed CFP^{CM} Curriculum
- Each text book is supported with a Question Bank Workbook with solutions
- Online faculty support in respect to each module
- E-mail query/support
- Financial calculator Casio FC-200V
- Stimulated mock test similar to the pattern of held at CFP^{CM} NSE centre
- Tutorial/Doubt clearing classes on daily basis by in-house faculties
- Lectures by Industry professionals
- 100% placement backup & career counseling



How to get CFP^{CM} Certification?

The candidate must be 10+2 pass but the Certification is awarded only on completion of the graduation from recognized College/University. The candidate must register with IABF for professional studies, an authorized education provider for pursuing this program to obtain study material and other support simultaneously registering with FPSB India.

To become CFP^{CM}, a candidate should clear all the prescribed exams. The minimum duration to become a CFP^{CM} is between 1-5 months. To attain CFP^{CM} Certification, candidate must satisfy 4E's of Education, Examination, Experience & Ethics.



CFP^{CM} gives rewarding career in following fields

- Banks
- Financial Planning Firms
- Wealth Management Companies
- Asset Management Companies
- Insurance Companies
- Investment Advisory Services
- Portfolio Management Services
- Training & Academics
- KPOs
- Self Employment



Recruitment Partner

iVentures Capital has agreed to give preference to IABF - CFP qualifiers in its recruitments.

Charter Members of FPSB India

FPSB India has several financial services companies as its charter members who are committed to provide preference to CFP^{CM} Certificate holders in their recruitments.



Special fee concessions for executives/professionals working with charter member companies*

Charter Members of FPSB India have resolved that they will give first preference to CFP^{CM} certificants in recruitment.



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