

TO STAND OUT

Become A Certified Financial Planner

Financial Planning's
Highest Global Standard



International Accepted
Financial Planning
Qualification



SEBI Approved
Certification for
Investment Advisers



Recognized in more
than 26 countries
across the world



Global Mark
of Excellence in
Financial Planning



Enhanced career
and employment
opportunities for
the Students



INSTITUTE FOR FINANCIAL LITERACY

(An Authorized Education Provider by FPSB Ltd.)

205, Shri Mansion, Kamla Marg, C-Scheme, Jaipur. 302001

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About Infily:

Institute for Financial Literacy is one of the India's leading financial educational institutions. Institute for financial literacy established in the year 2012, with an objective to educate people to enable them to work in the financial services industry efficiently and to make it a better place for everyone including investors & working professionals.

Institute for Financial Literacy is an authorized education Provider for CFP Education in India by FPSB Ltd. having alumni of more than 200 CFP's in India and imparting trainings for NISM Certifications, Workshop on Financial Planning, Investor Awareness Programmes.

We have an online portal www.Eduinfily.com where thousands of the students have been benefited for the online training for NISM Certifications and online training is available for all modules of CFP.

We are a team of seasoned professionals from Banks, Mutual Fund companies, Insurance companies, stock broking and the reason we could focus more on practical learning in our content which makes a huge difference.

We have been awarded by RFAG (Rajasthan Financial Advisor's Group) for our Contribution in CFP Education.

We as an organization has given training services to NSE, HDFC Mutual Fund, ICICI Prudential Mutual Fund, Axis Mutual Funds Mutual Fund and other corporates. We have hosted more than 1000+ Investor awareness Programme across the country educating more than 1 lac investors on financial planning.

Why Pursue The CFP Certification?



World-Class Financial Planning Certification Program.



SEBI Approved Certification for Investment Advisers



Rated as "One of the Best Job" by US News and World Report 2012



Oldest and most Recognized and respected advanced certification program for financial planners



Rated as the "Gold Standard" in Financial Planning by the Wall Street Journal in the year 2006

Rated as "Hot Job" by CNBC in 2003



Recognized in more than 27 countries across the world



Financial Planning Ranked as one of the best jobs of 2013 as per website careercast.com



Opportunity to join a global network of 192,000+ CERTIFIED FINANCIAL PLANNER



CFP is Ideal For:

Individuals who are interested in both academics and practical training. Certificants are qualified to provide with respect to all aspects of financial planning and will be able to make comprehensive financial plans.

- ✓ B. Com/M.Com/BMS/BBi/BAF/BFM/BBA
- ✓ Banking
- ✓ Sub Brokers

- ✓ Insurance Advisors
- ✓ CA-CA Inter/MBA Finance
- ✓ And anyone interested to make a glorious career in the field of Finance/Personal Finance / Financial Services

- ✓ Undergraduates, Graduates & Post Graduates
- ✓ Mutual Fund Distributors

High Growth Careers into:

A CFP^{CM} certificant is open to varied professions in the field of:

- ✓ Banking
- ✓ Mutual Funds and Other Financial Services
- ✓ Stock Broking Firms
- ✓ Wealth Management Companies

- ✓ Investment Advisory Services
- ✓ Life And General Insurance
- ✓ Fund Managers

- ✓ Financial Planning Organization
- ✓ Accounting and Law Firms
- ✓ Credit Counseling Organization



Personal Financial Management

Client Financial Situation
Time Value of Money
Cash Flow Demands and Conflicts
Budget and Emergency Fund
Financial Management Strategies

Investment Planning/ Asset Management

Investment Performance Management
Investment Theory
Asset Allocation
Wealth Management
Objectives, Constraints and Suitability

Regulatory Environment, Law/ Compliance

Economic Environment
Social and Political Environments
Compliance and Implications
Compliance and Implications
Anti-Money Laundering



Retirement Planning

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

Tax Planning and Optimization

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

Examination Structure:

Exam 1 -3 (Track Exams)

75 MCQ

Time: 2 hrs.

Online Exam

After 3 tracks Mandatory Financial Plan construction & submission to the board (After approval from the board, Student will be eligible for 4th Module)



Risk Management and Insurance Planning

Principles
Risk Exposures
Intro to Insurance
Insurance Company/Advisor Selection
Strategic Solution

Estate Planning

Estate Planning Terminology
Wealth Distribution Goals
Estate Planning Process
Transfer During Life and at Death
Planning for Incapacity
Estate Planning Strategies

Exam 4th Financial Planning Capstone Module

Case study Base Exam

100 MCQ

Time: 3 Hrs.

Online Exam



The Financial Planning Process
Client Engagement and Communication
Develop Financial Planning Recommendations
Developing Effective Plans
Financial Plan Assessment

About FPSB:

From 1 April 2019, the CFPCM certification program in India is directly administered by U.S.-based Financial Planning Standards Board Ltd. (FPSB Ltd.), owner of the international CERTIFIED FINANCIAL PLANNER certification program outside the United States.
www.India.Fpsb.Org

WE ARE FAMILY OF MORE THAN 200 CFP'S WHAT DO SOME OF THEM SAY..."



I did my CFP with Infily & want to special mention Rahul for his command & method of delivery. Highly commendable.

Bhupesh Ahuja
DSP Mutual Fund
Regional Head-Rajasthan



In my iind year of graduationI enrolled for the programme with Infily. Got through all exams in first attempt. Infily is a place where students get to study with corporate people also so it's anopportunity to learn finance with practical exposure and gives recruitment opportunities also.

Akshita
Student



From counselling to earning CFP title by clearing all exams. Rahul sir has always been there for me to help and I sincerely thank him for all his support during my CFP Journey.

Asisjot Singh
Student



As a financial planner I was always keen to pursue CFP as a study in my life and this title became possible for me due to help and direction of the faculties at Infily. Thank you

Rohitashava Kumbhakar
Individual Financial Planner
Jaipur

ELIGIBILITY EDUCATION PROGRAMMES

ELIGIBILITY CRITERIA: 12th Pass and 18 Years of age

Duration: This course can be completed within 10-12 Months

Mode of Study:

Online Live Classes: - Regular Online Classes for India + Global Content Chapter wise

Access to Online Study Portal	Mock Tests	Question Bank (Chapter wise)	Live Doubt & Preparatory Sessions	Financial Plan Construction Training
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Recorded Videos: - Recorded videos classes for India+ Global Content Chapter wise

Access to Online Study Portal	Mock Tests	Question Bank (Chapter wise)	Live Doubt & Preparatory Sessions	Financial Plan Construction Training
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Another Online Programme Offered (www.eduinfilly.com)

NISM VA (Mutual Fund Distribution)	NISM XA (Investment Adviser Level-1)	NISM XB (Investment Adviser Level-2)	NISM VIII (Equity Derivatives Examination)
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