

INSTITUTE FOR FINANCIAL LITERACY

An Authorized Education Provider of CFP in India



FUTURE OF FINANCIAL PLANNING

KNOW YOUR FACULTY

Mr. Rahul Agarwal, MBA, CFP
(Experience of 16 Yrs. in the Industry)

Last Corporate Assignment (2012)

Cluster Head-Aditya Birla SunLife Mutual Fund.

Founder of Institute of Financial Literacy (2012)

- **A CFP trainer, trained over 200 CFP Professional in India.**
- **Hosted 1000+ offline Session on Financial Planning for HDFC Mutual Fund, ICICI Prudential Mutual Fund, NSE & Other Financial Houses across the country addressed over 1 Lac Investors.**
- **Imparted Trainings on Financial Planning on Excel Over 250 Branch Heads of Life Insurance Corporation of India in Rajasthan & Haryana.**
- **Run Financial literacy Programmes for teachers and students Government Colleges on approval of Education Department, Government of Rajasthan**
- **Guest Speaker at Various top Universities & Colleges like Amity, JECRC, Manipal, Poddar, etc.**



DIFFERENT NEED - DIFFERENT PEOPLE

- **C.A. for Taxation**
- **Lawyer for Estate Planning (WILL & TRUST)**
- **Insurance Advisor for Insurance**
- **Mutual Fund Distributor for Mutual Funds**



We have no one for Financial Planning

- Because of No Formal Education for most important Planning of our Life

"FINANCIAL PLANNING"

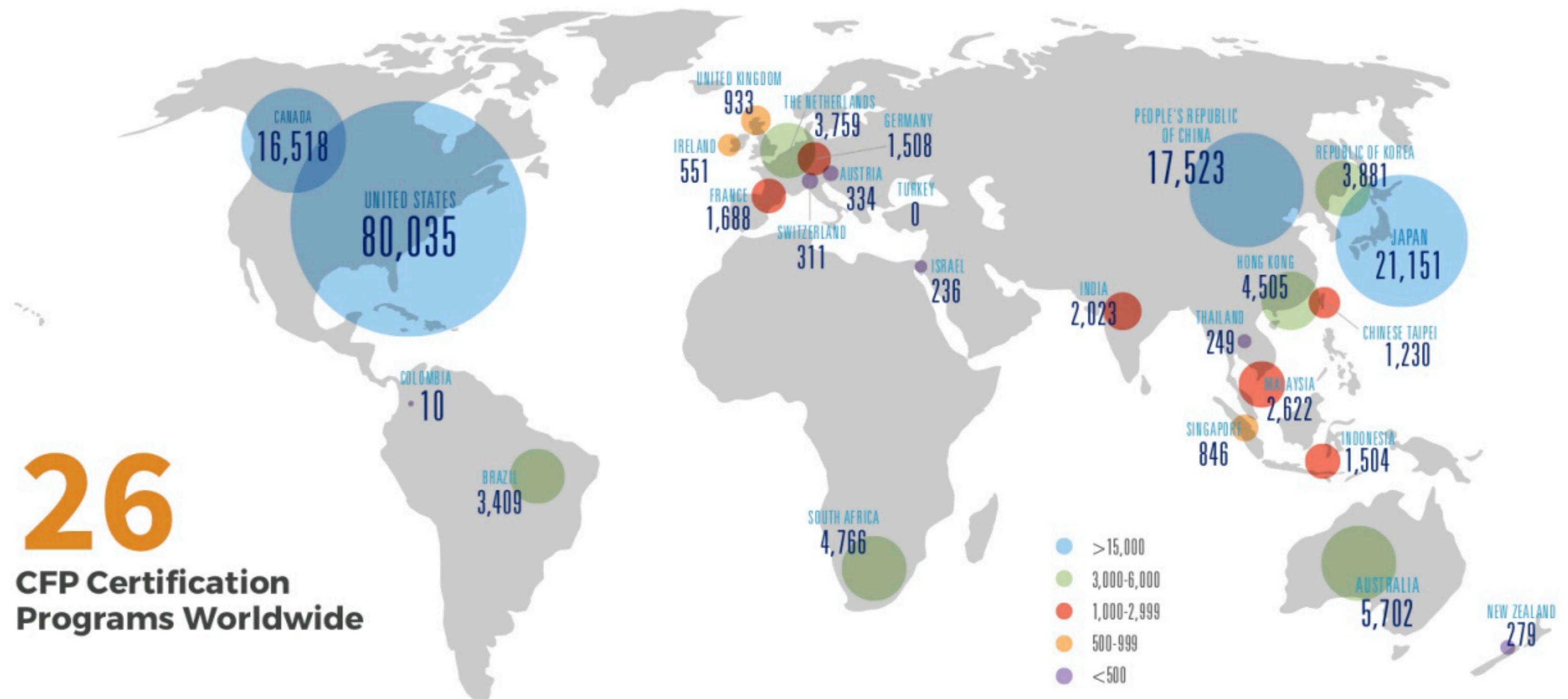
- Managing Money and reaching out to goals is more difficult than earning Money it self....



JACK OF ALL THE TRADES



Compared to household savings, No. of CFPs are very less..



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CFP Professionals by Territory

Rank	Territory	Count	Rank	Territory	Count
1	United States	80,035	14	Germany	1,508
2	Japan	21,151	15	Indonesia	1,504
3	China	17,523	16	Chinese Taipei	1,230
4	Canada	16,518	17	U.K.	933
5	Australia	5,702	18	Singapore	846
6	South Africa	4,766	19	Ireland	551
7	Hong Kong	4,505	20	Austria	334
8	Rep. of Korea	3,881	21	Switzerland	311
9	The Netherlands	3,759	22	New Zealand	279
10	Brazil	3,409	23	Thailand	249
11	Malaysia	2,622	24	Israel	236
12	India	2,023	25	Colombia	10
13	France	1,688	26	Turkey*	-

*Preparing to offer CFP certification

5 FPSB member organizations added
>200 CFP professionals

United States **+3,275**

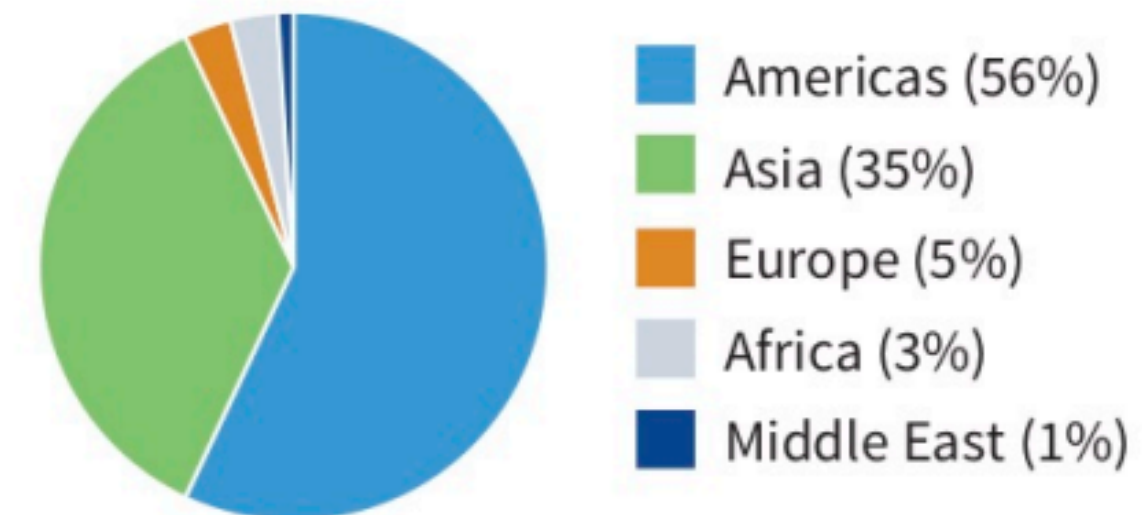
China **+645**

Brazil **+490**

Japan **+468**

Chinese Taipei **+247**

CFP Professionals by Region



Changing Wealth Management Industry.



State Bank of India

Central Recruitment & Promotion Department,
Corporate Centre, Mumbai

(Phone: 022-2282 0427; Fax: 022-2282 0411; E-mail: crpd@sbi.co.in)

RECRUITMENT OF OFFICERS IN SPECIALIZED POSITIONS FOR WEALTH MANAGEMENT IN STATE BANK OF INDIA

ADVERTISEMENT NO. CRPD/SCO-WM/2016-17/21

1. Online Registration of Application starts from: **24.03.2017**
2. Last date for Online Registration of Application & Payment of Fees: **10.04.2017**
3. Last date for receipt of the print out of Online application along with enclosures at SBI, CRPD, Corporate Centre, Mumbai: **13.04.2017**

State Bank of India invites Online applications from Indian citizens for appointment in following Positions in Specialist Cadre for wealth management in State Bank of India on contract basis. Candidates are requested to apply Online through link given in "careers" section of Bank's website www.statebankofindia.com or www.sbi.co.in

10	Investment Counsellors	15	6	3	1	25	1			23	35	Graduate/Post Graduate with AMFV/NISM (Module V) certified from Government recognized University or Institutions. <u>Candidates with CFP/CFA/SEBI IA Certifications will be preferred.</u>
11	Customer Relationship Executives	35	17	9	4	65	1		1	20	35	Graduate from Government recognized University or Institution

Changing Wealth Management Industry in India

Territories With Top Growth Rates

Brazil	36.4%
Indonesia	22.2%
India	17.6%
People's Republic of China	13.7%
Chinese Taipei	12.9%
Israel	11.7%

Number of CERTIFIED FINANCIAL PLANNER^{CM} Professionals in India Increased By 17% Over Previous Year

2021: Banner Year for Growth

2,338* CFP Professionals

17.6% year-over-year growth rate

*as of 12/31/2021

DENVER – 22 FEBRUARY 2022 –

Financial Planning Standards Board Ltd. (FPSB Ltd.), owner of the international CERTIFIED FINANCIAL PLANNER^{CM} certification program in India, announced today that the number of CFP^{CM} professionals in India grew by 17.6% last year, reaching a total of 2,338 CFP professionals at 31 December 2021. The CFP professional growth story in India is part of a growing

global movement, where last year saw the number of CFP professionals around the world reach an all-time high of 203,312.

17.6%
Increment in
Number of
CFPs in a year

WHY PURSUE CFP?



- **No Formal Education in India for Financial Planning**
- **No course which covers so wide range of aspects of Financial Planning**
- **For financial planner's, it can make them more productive with knowledge**
- **Students can make them employable as ample of recruitment opportunities**
- **Global recognition**

CFP COVERS THE WHOLE SPHERE OF PERSONAL FINANCE



**FPSB® Investment
Planning Specialist**



**FPSB® Retirement &
Tax Planning Specialist**



**FPSB® Risk & Estate
Planning Specialist**



WHO CAN PURSUE THIS PROGRAM?



**12th pass or graduate
STUDENTS** who aspires to
make a great career in core
Finance, Wealth
Management, investment
banking industries.



Working Professionals
who desire to take their
existing career to next
level and lead in the
industry.



Chartered Professionals
or independent advisors
who strongly believe in
upgrading themselves
for betterment of their
clients and themselves.

Minimum Eligibility to start the program is 12th Pass & 18 years old

EXAMINATION

→ Online Exams take place on the mettle platform

→ Every month 7 days window is available for booking exams

→ No cap on Maximum attempt

→ Calculator & spreadsheet allowed in exam for calculation



EXAM STRUCTURE

FPSB® Exam Structure

FPSB® Investment Specialist Exam

- Personal Financial Management
- Investment Planning
- Regulatory Environment, Law and Compliance

FPSB® Retirement and Tax Planning Exam

- Retirement Planning
- Tax Planning

FPSB® Risk and Estate Specialist Exam

- Risk Management
- Estate Planning

CERTIFIED FINANCIAL PLANNER® Exam

- Financial Planning Principles, Process and Skills
- Integrated Financial Planning

EXAM - 1

EXAM - 2

EXAM - 3

EXAM - 4

First Three Exams

- ✓ MCQs
- ✓ 75 Questions
- ✓ 2 Hrs
- ✓ No Negative Marking

Integrated Financial Planning

- ✓ MCQs
- ✓ 50 Questions
- ✓ 3 Hrs
- ✓ No Negative Marking
- ✓ Case Study

1st Three Track Exams



**Financial Plan Submission
(Capstone Project)**



**After assessment student Can opt for
4th Module
“Integrated Financial Planning”**

**Eligibility for Final Certificate = 3 Yrs work experience
in any Finance Domain**

ABOUT INFILY

- Established in July' 2012.
- An Authorized Education Provider for CFP Education in India.
- Conducted many Corporate Trainings.
- Workshops on Financial Planning
- Associated with SBI MF, CIEL, NSE, BSE, HDFC MF, ICICI MF For Investor Awareness Programs.
- Most Successful Training Institute for CFP in Past 10 years.



**AWARDED BY RAJASTHAN
FINANCIAL ADVISOR'S
GROUP FOR
CONTRIBUTION IN CFP
EDUCATION**

**AWARDED BY NATIONAL
TRAINING HEAD-HDFC MF &
ZONAL HEAD-UTI MF OR
CONTRIBUTION IN CFP
EDUCATION**



OUR OFFERINGS

- **Weekend Live (Sat & Sun) classes Chapter wise (Global + Indian Content Both)**
- **Recording of Classes**
- **Online Portal (Mock Test + Question Bank)**
- **PPT of Study Materials**
- **Exam Preparation Classes**
- **Friday Doubt Solving Sessions**
- **Financial Plan Construction Training**
- **Guaranteed Internship Opportunities during the course at Jaipur's top financial planning firms**



INFILY'S EXCLUSIVE INTERNSHIP PARTNERS



Ark Primary Advisors Pvt. Ltd.
understanding people before numbers



Imperial Prime Capital Pvt. Ltd.



SLA Capital Pvt. Ltd.

KNOW OUR PLACED STUDENTS



Mr. Vaibhav Baheti

*Client Associates,
Gurgaon*



Ms. Shreya Agarwal

*Befree,
Ahmedabad*



Mr. Anirudh Sharma

*SLA Capital Pvt. Ltd.,
Jaipur*



Mr. Sagar Lalwani

*Maloo Investwise,
Jaipur*



Ms. Mansi Jain

*Ark Primary Advisory Pvt. Ltd.,
Jaipur*



Mr. Ankita Sharma

*Ark Primary Advisory Pvt. Ltd.,
Jaipur*



KNOW OUR PLACED STUDENTS



Mr. Raghav Maheshwari

*Cointree India Finman pvt. Ltd.,
Jaipur*



Ms. Sakshi Badaya

*Oracle Corporation,
Jaipur*



Ms. Chetana

*Ark Primary Advisory Pvt. Ltd.,
Jaipur*



Ms. Vanshika Agarwal

*Money Count,
Jaipur*



Mr. Sourabh Chalana

*Morgan Stanley,
Sri Ganganagar*



Mr. Nikhil Sharma

*NAV Backoffice,
Jaipur*



MEET SOME OF OUR ALUMNI OUT OF 200+



Mr. Vidhit Bhura

*Director,
JNV Associates,
Jaipur*



Mr. Nitish Purohit

*Director,
JNV Associates,
Jaipur*



Mr. Ramesh Ahir

*Head - Rajasthan,
Tata Mutual Fund,
Jaipur*



Mr. Bhupesh Ahuja

*Regional Head - Rajasthan
DSP Mutual Fund,
Jaipur*



Mr. Arvind Bhargava

*Regional Head - Rajasthan
HDFC Mutual Funds,
Jaipur*



Mr. Amit Sharma

*Product Head - Rajasthan
ICICI Prudential Fund,
Jaipur*



FROM 1 STUDENT TO ALUMNI OF 200 CFP'S IN INDIA



UNIVERSITIES & COLLEGE ASSOCIATIONS:



JECRC, Jaipur



Manipal University



IILM, Jaipur



Amity, Jaipur



Poddar Institute



RNB University

CORPORATE TRAININGS & WORKSHOPS:



JAIPUR



ROHTAK



AJMER



JODHPUR



PANIPAT

1000+ INVESTOR AWARENESS PROGRAMS HOSTED



CAREER OPTIONS POST CFP

1

**Financial
Advisor**

2

**Investment
Banker**

3

**Wealth
Advisor**

4

**Portfolio
Manager**

5

**Mutual Fund
Distributor**

6

**Estate
Planner**

7

**Insurance
Advisor**

8

**Stock
Broker**

9

**Tax
Consultant**

10

**Personal
Financial Planner**

11

**Trainer for personal
finance products**



1. The fee in INR is based on the exchange rates. Here we have taken a round off Rs. 75 to \$1 rate. The fee may increase or decrease with the change in exchange rate.
2. Discount Coupon worth \$150 is claimable only on the study material fee.

CONTACT US

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<https://www.linkedin.com/in/rahul-agarwal-0bb60722>
- Website:
www.infily.in
www.eduinfily.com

