



Certificate in **INVESTMENT PLANNING**

**Pathway to CFP^{CM} -Investment Specialist
Certification**

- › Prepares you for CFP- Investment specialist Module
- › Access to 600+ Questions-as per new syllabus
- › Covers - NISM VA | XA | XB exams
- › Access to High Quality Video Resources

proschoool
An **ims** Initiative




Skill India
कौशल भारत - कुशल भारत


N·S·D·C
National
Skill Development
Corporation
Transforming the skill landscape

www.proschooolonline.com

About CFP^{CM}

This is the highest level of certification awarded to individuals globally in the field of Financial Planning. The certification prepares aspirants to achieve high caliber in order to provide compendious financial advisory services to individuals and be well placed in the financial services industry.

In recent years, Financial Planning has gained momentum in India due to the demand-supply gap of financial planners and aspiring individuals have a bright future in this sector.

1,70,000

Certified individuals present globally

2,50,000

Estimated to further rise



WHY TO CHOOSE CFP?



Be among the best financial planning professionals around the globe



Increase in High Net Worth Individuals (HNWI) requiring financial planning from
Year 2007- 1,24,000
Year 2017- 3,30,000



With more complex financial instruments entering the market, demand for financial planners is increasing



Diverse career options ranging from Tax specialist, Sr. Financial Planner to starting your own consultancy

Certificate in FINANCIAL PLANNING

Proschool's CIP Program is a pathway program to CFP Investment specialist certification and will automatically prepare you not just for the FPSB exam but also gets you ready for kicking off your career into investment planning.

WHO CAN PURSUE CIP



Executives in the BFSI sector willing to shift to Financial Planning



Financial advisers wanting to increase credibility



Individual Aspiring Investment Specialist Certificate

SALARY & CAREER STAGES

MID LEVEL

Type of Roles:
Sr Financial Planner, Regional Manager, Heading Wealth Management dept.

Rs. 5Lakhs to Rs.10Lakhs

SENIOR LEVEL

Type of Roles:
Director of Financial Planning, Entrepreneur

Above Rs.10 Lakhs

JUNIOR LEVEL

Type of Roles:
Relationship manager, Executive, Trainee

Rs. 2Lakhs to Rs. 5Lakhs



CIP CURRICULUM

- Module I - Personal Financial Management
 - Module II - Investment Planning and Asset Management
 - Module III - Regulatory Environment, Law and Compliance
 - Module IV- NISM Investment Adviser Module
 - Module V - NISM Mutual Fund Distributors Module
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ELIGIBILITY

A candidate must be HSC/12th pass at the time of program registration

FACULTY



Abhishek somani

CFP |15+ Years Experience in Financial Planning and Professional Training | Eduprenuer

Joel Kuriakose

CFP | Wealth Management Consultant | Financial Planner



Pranav Nambiar

CFP Professional | CFA Level 1
Investment Banking Associate | Amarons
Capital Advisors



CFP^{CM} EXAM PROCESS

01

Register for CIP
Program offered by
Proschool



02

Clear
CIP Program
Register for CFP
Program



03

Clear
CFP Program

CERTIFICATION

1 Certificate in Investment Planning (from IMS Proschool & NSDC)

Clearing all Internal assessment's with minimum 60% and above

2 FPSB's Investment Specialist Certificate (Optional)

This certificate can be opted by registering with FPSB by paying respective fees and successfully clearing the Investment Specialist examination.

3 NISM V-A Certificate (Mutual Fund Distributors) (Optional)

This certificate can be opted by enrolling through NISM website and successfully clearing the respective exam.

4 NISM X-A and X-B Certificate (Investment Adviser Level 1 & 2) (Optional)

This certificates can be opted by enrolling through NISM website and successfully clearing the respective exams.



PLACEMENT PROCESS

Proschool not only helped me in clearing the exams, but also made me able and skilled for real life financial planning problems

Deepti Patel
Director Invest Edge

DURING THE PROGRAM



Goal Setting & Resume Building



Practice Test

ON PROGRAM COMPLETION



Access to Placement Portal



Mock Interviews

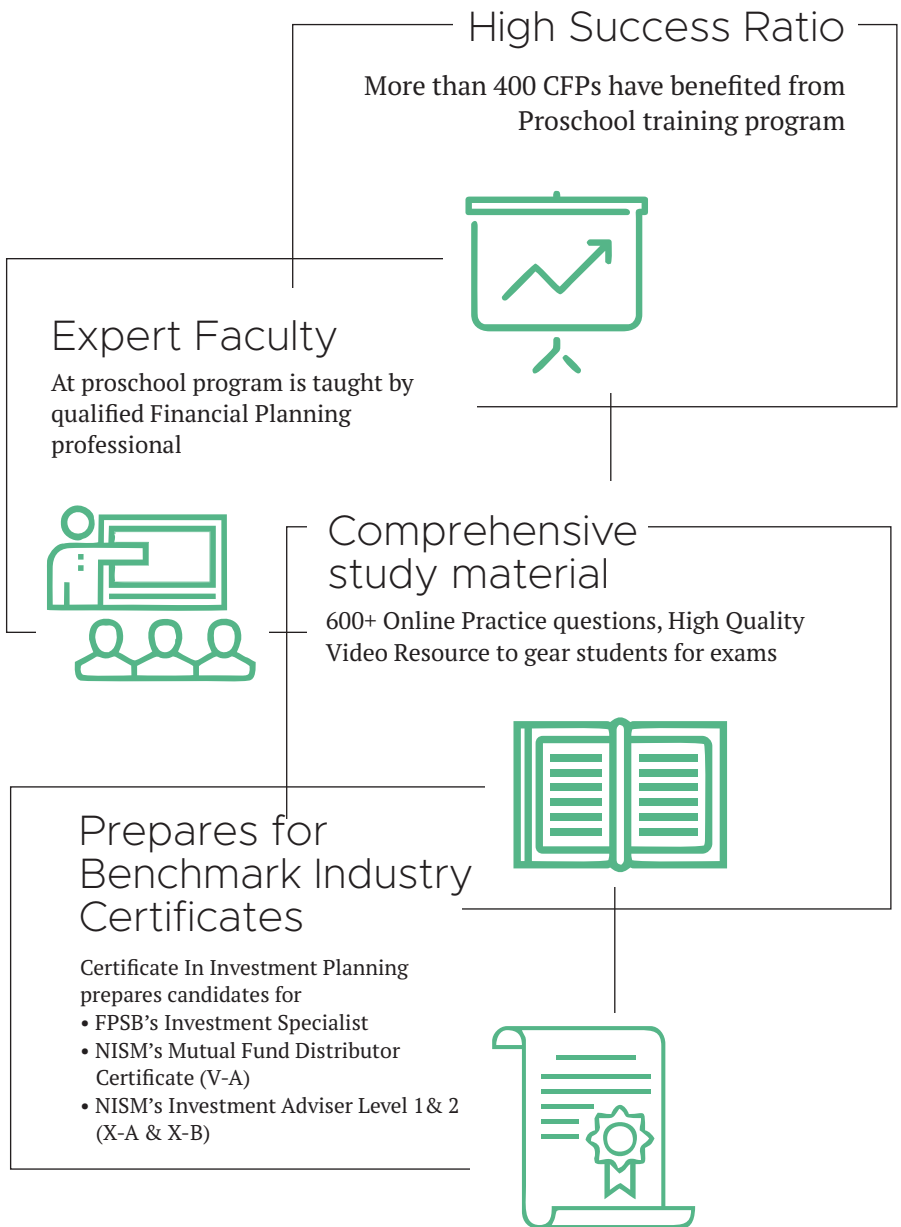


Hand-Holding

Proschool not only helped me get certification but also groomed me to get job ready through their placement assistance

Sonaal Sinha
IDBI Capital

CIP PROGRAM HIGHLIGHTS



STUDY OPTIONS



Classroom Training

Tutored by industry professionals with excel based training and updated study material



Online Training

Live and interactive training program with recorded lectures for future reference



Distance Learning

Online updated study material for effective preparation

Proscool, is an initiative of IMS. At IMS, our goal for the past 40 years has been simple – **Build a long-term successful career.** Proscool is an extension of the same mission. At Proscool, we provide practical skills and knowledge at affordable cost in the shortest possible time. Our endeavor is to get students into jobs that give them useful experience for a successful and long term career.

IMS Proscool with its parent organization has trained over 3,00,000 students across India for different competitive exams and professional courses such as CFA® Program, CFP^{CM}, CIMA, CPA, etc.



ABOUT US

LEADING COMPANY FOR PROFESSIONAL STUDIES

- Trained over 20,000 professionals for leading BFSI companies such as SBI, BOI, UTI, Kotak, ICICI, Sundaram BNP Paribas, Citibank in Financial Planning & Wealth Management
- Trained over 6000 students under Financial Analyst Series
- Trained over 2000 students in the field of Analytics
- Trained over 10,000 under-privileged students for State & Central Government

HISTORY OF TRUST

- IMS Group is training students since 1977.
- IMS ranked among the “most trusted” education brands.
- IMS Proscool has emerged as a leading national player in professional skills training.
- IMS Proscool has been awarded The Best Learning Partner by CIMA India.
- IMS Proscool ranks 4th among the Top 10 Analytics / Data Science Training Institutes in India in 2018 by the Analytics India Magazine.

PROGRAMS

Finance Analyst : CFA® Program | Financial Modeling | PGP- IBCM
Management Accounting : CIMA | PGP in Management Accounting
Accounting : ACCA | IFRS
Analytics : Business Analytics | PGD in Data Science
Marketing : Digital Marketing

OUR CENTRES

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