

## Course Structure:

Introduction to Financial Planning	General principles such as education planning; client interactions and the time value of money applications
Risk Analysis and Insurance Planning	Risk Analysis, its strategies, and its applications, Insurance Concepts, Insurance Policies, Environment of an Insurance advisor
Retirement Planning and Employee Benefits	Retirement Planning, Retirement Benefits, Retirement Planning, and Strategies, Pension sector reforms, Reform proposals, etc.
Investment Planning	Investment Planning, Investment vehicles, Investment strategies, Regulation of an investment advisor, Application to clients
Tax Planning & Estate Planning	Tax Planning Considerations, Tax Computations, estate planning etc.
Advanced Financial Planning	includes gathering client data and determining goals and expectations, etc.

## Curriculum Sheet:-

The CFP course is conducted by FPSB in India. The questions given are Multiple choice questions(MCQs). The examination is computer-based. Exam duration for 1 to 4 is 2 hours each and for exam 5 the duration is 4 hours.

Module	Name	Testing Exam	Exam Composition	No. of items	Marks Categories \$
Module I*	Introduction to Financial Planning	NA	NA	NA	NA
Module Planning 77	II Risk Analysis & Insurance Planning	Exam 1	Module I – 20% Module II – 80%	77	1,2,3 & 4
Module III	Retirement Planning & Employee Benefits	Exam 2	Module I – 20% Module III – 80%	77	1,2,3 & 4
Module IV	Investment Planning	Exam 3	Module I – 20% Module IV – 80%	77	1,2,3 & 4
Module V	Tax Planning & Estate Planning	Exam 4	Module I – 20% Module V – 80%	77	1,2,3 & 4
Module VI	Advanced Financial Planning	Exam 5	Case Study # format	Case Studies/ 30 items	2,3,4 & 5