

PCTI Group

An ISO 9001:2000 Certified Organization



INTERNATIONAL INSTITUTE
OF FINANCIAL STUDIES

International Institute of Financial Studies

About IIFS

Strategic Business Unit of PCTI Group

Education Provider of FPSB India

Delivers CFP^{CM}, AFP, Financial Accounting and Skill Development Program

Difference between CFP^{CM} and CFA

- CFP^{CM} gives advice to individual.
- Helps in Financial Planning of individual
- CFA advices to Financial Institutions like Bank, AMCs etc
- Focus on Stock and Market Analysis to make correct investment decisions

Financial Planning Standard Board (FPSB) India

- Affiliate of FPSB, Denver USA
- Currently in more than 23 Countries
- Public – Private Enterprise
- Professional Standard Setting Body for Financial Planners in India
- FPSB India currently have 50 leading financial services organisations as its Charter Members

Programs Offered by FPSB India

- **Certified Financial Planner (CFP^{CM})**
International Certification Program in field of Financial Planning, Wealth Management and Advisory Services
- **Associate Financial Planner (AFP)**
Successful completion of one Module (One Specified Category)

Benefits of Certified Financial Planner (CFP^{CM})

- Enhanced Career and Employment Opportunities with Financial Services Company
- Satisfied Clients leads to increase in revenue
- Recognition in 23 Countries
- Part of the Global League of Professionals
- Personal Satisfaction

Pathway to Certified Financial Planner (CFP^{CM})

- 10th Pass at the time of Enrollment, 12th for CFP^{CM} certification
- Pass Papers on Self Study or Support from Education Provider`
- Exams facilitated by NSE
- Online Examination
- Conducted at NSE Exam Centres
- Experience – 3 Years for Graduates, 6 Years for Non Graduates

Certified Financial Planner (CFP^{CM}) Program Details

- **Module I** - Introduction to Financial Planning
- **Module II** - Risk Analysis & Insurance Planning
- **Module III** - Retirement Planning & Employees Benefits
- **Module IV** - Investment Planning
- **Module V** - Tax Planning & Estate Planning
- **Module VI** - Advanced Financial Planning

CFP^{CM} Examination Details

- **Exam 1** - Risk Analysis & Insurance Planning + Introduction to Financial Planning
- **Exam 2** - Retirement Planning & Employees Benefits + Introduction to Financial Planning
- **Exam 3** - Investment Planning + Introduction to Financial Planning
- **Exam 4** - Tax Planning & Estate Planning + Introduction to Financial Planning
- **Exam 5** - Advanced Financial Planning

CFP^{CM} Examination Details

	Exam 1 to 4	Exam 5
• Fees	Rs. 2000/- per Paper	Rs. 5000/-
• Exam	2 Hours per Paper	4 Hours
• Centre	71 NSE Centres	6 NSE Centres
• Enrollment	NSE Website	FPSB Website
• Language	English	Eng and Hindi
• Date	Daily (Mon-Sat)	Monthly (3or4 Sat)
• Paper Type	MCQ (No Negative Marking)	Case Study Based

CFP^{CM} Registration Process

- Select Education Provider or Self Study Option
- Obtain NCFM (NSE's Certification in Financial Markets) Number from NSE Website
- Register as Student Member of FPSB India Online
- Pay Rs. 10,000/- Online or through DD in favour of FPSB India
- Member Login ID and Password on Payment to FPSB
- Submit Student Signed Registration Form with DD and Qualification Documents
- FPSB activates Student Registration and Online Login facility
- Student can take exam 60 days after activation

What IIFS Offers

- Students can enroll in IIFS through its website www.iifs.pctiltd.com
- Select IIFS as Education Provider while registering on FPSB India Website
- IIFS Offers program in DLP Mode presently
- Provide Quality Study Material on each Module duly approved by FPSB India
- Provides Work book, Online / Email Support
- Fees – Rs. 10,000/- per Student + Service Tax (All inclusive)
- Fees to be made in form of **DD drawn in favour of IIFS payable at Delhi**

For Further Information

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