



EDUFINPACT  
LABS PVT LTD.

# ABOUT US

EDUFINPACT LABS PVT. LTD. IS INDIA'S ONE OF MOST RECOGNIZED FINANCIAL TRAINING ACADEMY. RENDERING PROFESSIONAL INTERNATIONAL COURSES TO VARIOUS SECTIONS OF SOCIETY AROUND THE WORLD. FOUNDED IN 2018 IT HAS RENDERED SERVICES TO THOUSANDS OF PEOPLE ACROSS THE GLOBE. WE TRULY BELIEVE FOR A CHANGE IN THE GLOBAL ECONOMY THERE IS A HUGE REQUIREMENT OF TALENT TO ENHANCE THE PRODUCTIVITY . FOUNDED BY HIMANSHU MAYNE CFPCM WHO BELIEVES IN ACCELERATING GROWTH OF EACH AND EVERY STAKEHOLDER ASSOCIATED WITH THE INSTITUTION. IFA PROVIDES SERVICES LIKE CERTIFIED FINANCIAL PLANNER (CFP), CFA, NISM, STOCK MARKET TRAININGS, DERIVATIVES, FINANCE LAB, ADVANCED EXCEL, CORPORATE TRAININGS, FINANCIAL AWARENESS PROGRAMMES TO STUDENTS, CORPORATES AND SOCIAL GROUPS AND MANY MORE SUCH WORKSHOPS.

## OUR KEY VALUES



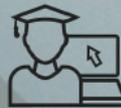
Authorised CFP trainer



Industry experts



Live Hybrid Lectures



Provision of recorded lectures



Personal Assistance



Placement Assistance



# CERTIFIED FINANCIAL PLANNER (CFP®)

## WHAT IS CFP®?

- CFP (Certified Financial Planner) is a globally recognized professional certification.
- Valid in 27 countries, CFP provides exposure to various areas of wealth management.
- It covers investment planning, risk management, estate planning, and retirement planning comprehensively.

## WHO CAN DO CFP®?

Any individual who has a HSC Degree and interest in the financial industry can enroll for CFP.

## BENEFITS OF CFP®

ENHANCE YOUR QUALIFICATION	ENHANCE YOUR EMPLOYABILITY	ENHANCE YOUR PROSPECTS
CFP is the world's most prestigious certifications for those wanting to make a career in the field of Finance	CFP Certified are supported & recruited by more than 50 companies in the Financial Services Industry of India	CFP Mark is rated as the "Gold Standard" by "Wall Street Journal"
CFP is internationally recognized across 27 countries	The course aims at imparting practical knowledge on the various important topics in Finance	CFP is acknowledged as one of the best upcoming certification in financial services in India by "The Week"
The course can be flexibly pursued along with your studies or job	The course is employment oriented	CFP is rated as "Hot Jobs" by CNBC and it is Recognized by SEBI
The Course can be completed within a short duration.	1,00,000 CFP professionals are required on an immediate basis by various Finance Companies.	Financial Planning has been rated as the No. 1 career by Jobs Almanac, USA

# CAREER OPPORTUNITIES AFTER CFP®?

We provide the required edge to an individual and offers varied professional opportunities. Few companies we provided placements are as below-

## "CAREER OPPORTUNITIES AS A CFP® PROFESSIONAL"

Levels	Entry	Middle	Senior
Qualification / Experience	Pursuing CFP® Certification Education Program + Graduate Fresher	Passed CFP® Certification Examination + Work Experience of 1-2 years	Attained CFPCNI Certification + Experience of more than 3 years
Job Profile	Trainees and Bank Executives, Wealth Managers & Financial Advisory Firms	Relationship Managers, Wealth Managers, Financial Planners / Advisors, Investment & Insurance Advisors	Sr. Planner / Advisors, Team Leaders, Functional Heads, Business Heads, Specialists
Expected Pay Package	Rs. 3 to 4 Lakhs	Rs. 6 to 8 Lakhs	Above 9 Lakhs



# Join the Global Community of ~2,23,000 CERTIFIED FINANCIAL PLANNER® Professionals

## FPSB® Financial Planning Capstone Course



### EDUCATION MODULES

- ① **Personal Financial Management**
  - Client Financial Situation(I)
  - Time Value of Money
  - Cash Flow Demands and Conflicts
  - Budget and Emergency Fund
  - Debt and Financing Alternatives
  - Financial Management Strategies
- ② **Investment Planning/ Asset Management**
  - Asset Classes and Securities
  - Pooled Investment Products
  - Principles of Investment Risk
  - Investment Performance Management
  - Investment Theory
  - Asset Allocation
  - Wealth Management
  - Behavioral Finance
  - Objectives, Constraints and Suitability
- ③ **Regulatory Environment, Law/ Compliance**
  - Client Best Interest
  - Economic Environment
  - Social and Political Environments
  - Compliance and Implications
  - Anti-Money Laundering

### EDUCATION MODULES

- ① **Retirement Planning**
  - Retirement Principles
  - Retirement Objectives
  - Retirement Needs, Analysis and Projections
  - Sources of Retirement Cash Flow
  - Retirement Cash Flow, Withdrawal Projections and Strategies
- ② **Tax Planning and Optimization**
  - International Taxation
  - Cross Border and Source Rules
  - Tax Strategies
  - Accounting Standards and Research

### EDUCATION MODULES

- ① **Risk Management and Insurance Planning**
  - Principles
  - Risk Exposures
  - Intro to Insurance
  - Insurance Company/Advisor Selection
  - Strategic Solution
- ② **Estate Planning**
  - Estate Planning Terminology
  - Wealth Distribution Goals
  - Estate Planning Process
  - Transfer During Life and at Death
  - Planning for Incapacity
  - Estate Planning Strategies

### FPSB® Certified Financial Planning

- ① **The Financial Planning Process**
  - Financial Planning Process
  - Practice Standards
  - Professional Skills
  - Client Characteristics
  - Client Engagement and Communication
  - Critical Thinking
- ② **Engaging Clients for Life**
  - Introduction to the Discovery Process
  - Appreciative Inquiry
  - Discovery Process Applied
  - Goal Determination, Refinement and Setting
  - Develop Financial Planning Recommendations
  - Presenting Recommendations to Clients
- ③ **Developing Effective Financial Plans**
  - Financial Planning Overview
  - Financial Plan Elements
  - Developing Effective Plans
  - Sample Financial Plans
  - Financial Plan Assessment

## CAPSTONE CYCLE

Case study by FPSB  
Financial Plan submission  
Financial Plan results  
CFP Exam



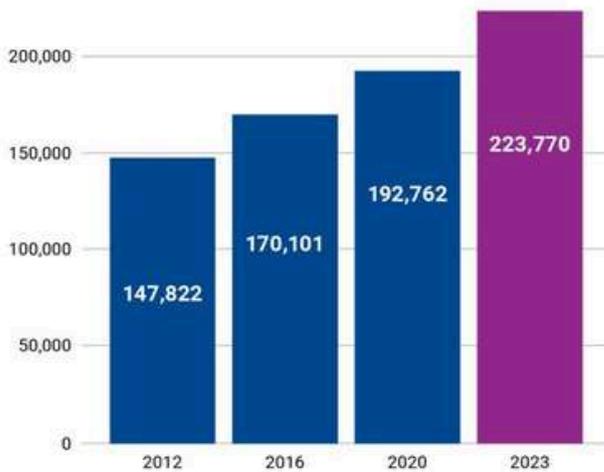
# 2023 Growth of CFP Professionals

**10,768**  
increase over  
previous year

**223,770**  
CFP Professionals Worldwide  
2023 year-end figures

**↑ 5.1%**  
growth rate

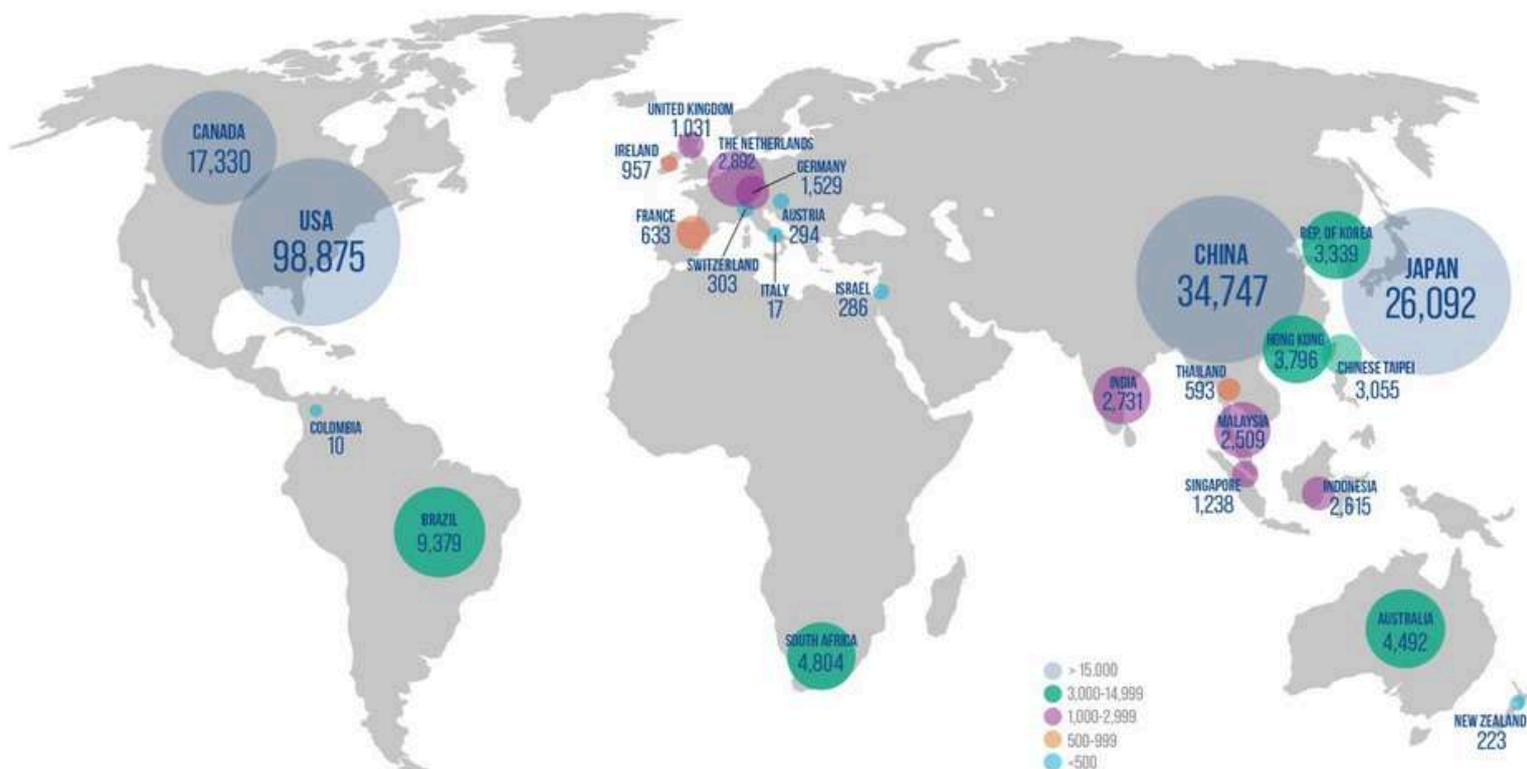
## Global Growth of CFP Professionals



## CFP Professionals By Territory

United States	98,875	Malaysia	2,509
China	34,747	Germany	1,529
Japan	26,092	Singapore	1,238
Canada	17,330	United Kingdom	1,031
Brazil	9,379	Ireland	957
South Africa	4,804	France	633
Australia	4,492	Thailand	593
Hong Kong	3,796	Switzerland	303
Rep. of Korea	3,339	Austria	294
Chinese Taipei	3,055	Israel	286
The Netherlands	2,892	New Zealand	223
India	2,731	Italy	17
Indonesia	2,615	Colombia	10

**10X** increase in the number of CFP professionals since 1990, when CFP certification first went international





**Meera Gada**

Local Guide · 29 reviews · 6 photos

★★★★★ 2 months ago

I've had the best experience of online lectures until now, the way Radhika ma'am teaches us doesn't bore us at all.

I don't believe in the concept of online classes but radhika ma'am makes sure she is always interesting and also the way she solves our queries/doubts at any moment you text her is amazing. I'm really thankful to Radhika ma'am specially and team IFA throughout.

← Reply   👍 Like



**Nikita Keluskar**

1 review

★★★★★ 2 months ago

IFA is one of the best institutions for CFP. The faculty and staff are really helpful, polite, and approachable. One of the best teaching experience I have experienced so far. They also guide you through the whole process of CFP from registration to booking your seat for examination. I really appreciate all the hardwork, support and motivation provided by Himanshu Sir and their staff to each and every student of their academy. I would recommend this class if you're pursuing CFP. 😊

← Reply   👍 Like



**Sakshi Sonawane**

2 reviews

★★★★★ 5 months ago

This class is one of the best for your Certified Financial Planning preparation (CFP). I've been here since 5 months and my experience has been quite satisfying. The faculty, the management and even the CRM team takes up your care personally and is always there to help you. (Even with the registration process with FPSB and helps you to do so without mistake). The teaching pattern is apt, interesting and very clear. If not to you, you can anytime catch up with them to ask doubts. The teaching material taught with and provided is enough for you to pass the exam. (DON'T MISS THE EXAMS AS THEY ARE MOST IMPORTANT HERE). And giving those exams made me pass my level 1 of CFP smoothly. Consider this class in your list when you think of giving any capital markets examination.

👍 2



**Mayuresh Thakur**

3 reviews

★★★★★ 2 months ago

From a CFP student point of view..

The course was very comprehensive and easy to understand. The instructors made sure that they are giving the information in a way that won't make me confused and doing their best to support learners. Great experience overall this year even though it had been mainly online. Teaching has been great and extra effort has gone into supporting us students.

← Reply   👍 Like



**146 Pratham Patil**

6 reviews

★★★★★ 5 months ago

Will would suggest if you want to get knowledge about finance and want to learn how to manage your expenses in day today or in business life this institutions is the best institutions. It has the best teaching staff and the best facilities.

← Reply   👍 2



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