

The WallStreet<sup>®</sup>  
School | INDIA  
SINCE 2009

# CERTIFIED FINANCIAL PLANNER<sup>®</sup>

Course Brochure



World's Leading Professional Certification  
in Personal Finance, Financial Planning,  
Investments, and Wealth Management.

## **The Rising Demand for CFP® Certification**

In today's rapidly evolving financial landscape in India, the need for CERTIFIED FINANCIAL PLANNERS (CFP®) certification is greater than ever. With individuals seeking expert advice to navigate their wealth, retirement, and long-term financial goals, the CFP® certification designation stands as a mark of trust and excellence. Pursuing the CFP® certification program not only deepens your expertise but also opens up a world of opportunities in financial advisory and wealth management. It's more than just a qualification—it's a commitment to making a meaningful difference in the financial lives of others.

**Krishan Mishra, CMgr FCSI**  
**Chief Executive Officer at FPSB India**



## CFP Certification @ TWSS



- Attain the globally recognized CERTIFIED FINANCIAL PLANNER (CFP®) certification, one of the most prestigious credentials in personal finance and wealth management.
- Build comprehensive expertise in financial planning, including investments, retirement, tax strategies, and estate planning, equipping you to thrive in a rapidly evolving financial landscape.
- Join a respected global community of over 2,23,000 CFP® certified professionals, known for their commitment to ethical practices and providing sound financial advice to clients.
- Excel in the CFP® certification program with our structured coaching, designed to provide you with practical skills and in-depth knowledge for passing the exam with confidence.
- Master the complexities of personal finance and wealth management through our targeted coaching program, ensuring your readiness for success in the CFP® certification exams.
- Excel in the CFP® certification exams with our coaching, backed by an impressive 91% pass rate, reflecting our commitment to your success.

## Introduction

The CERTIFIED FINANCIAL PLANNER (CFP®) certification is a leading credential in financial planning, covering areas like investments, retirement, tax strategies, and estate planning. It's designed for professionals looking to provide trusted financial advice and make a real impact on their clients' financial futures. Gaining a CFP® certification boosts your credibility and opens up new opportunities in financial advisory and wealth management. At The WallStreet School, we offer tailored coaching with a 91% pass rate, ensuring you gain the practical skills and confidence needed to excel in both the exam and your career.



- **High Pass Rate:** Ensure success in CFP® certification exams.
- **Expert Faculty:** Learn from seasoned industry professionals.
- **Comprehensive Coverage:** Complete, in-depth CFP® certification syllabus.
- **Practical Learning:** Real-world case studies and scenarios.
- **Live Classes:** Interactive, engaging live sessions for deeper understanding.
- **Personalized Attention:** Small batch sizes for focused learning.
- **Ethics-Focused:** Strong emphasis on ethics and professionalism.
- **Career Support:** 100% Job placement assistance and career guidance.
- **Strong Network:** Connect with a growing professional alumni base.
- **Tailored Exam Prep:** Customized materials and mock tests for exam success.

## Why Certified Financial Planner (CFP®) Certification



The CFP® certification is a globally recognized credential in financial planning, covering critical areas like investments, retirement, and tax strategies. It enhances your credibility and sets you apart as a knowledgeable and skilled professional in the field.

Earning the CFP® certification designation also signals your commitment to ethics and professionalism. It helps build trust with clients, positioning you as a reliable advisor who prioritizes their financial well-being and long-term success.

This certification opens up broader career opportunities in financial advisory, wealth management, and private banking. Employers and clients highly value CFP® certification professionals for their comprehensive financial planning expertise.

In addition to knowledge, the CFP® certification equips you with practical, real-world skills to tackle complex financial challenges. It prepares you to provide meaningful advice, helping you grow and succeed in your career.



## Our Mentor

Jalaj, our CFP® certification mentor, is a seasoned Senior Finance Professional with extensive experience in trading, services, and manufacturing industries. Skilled in budgeting, financial planning, internal audit, and tax planning, he holds prestigious qualifications such as CA, CS, and CIMA (UK). With a strong focus on practical, real-world financial insights, he is dedicated to helping students excel in their CFP® certification journey.



## Our Founders

With over 21+ years of experience in investment banking, consultancy, and advisory roles, Himanshu has a strong background in strategic consultancy, valuation, and private equity. After working with firms like McKinsey, Moody's, and PwC, he co-founded ARC Financial Services and later The WallStreet School in 2009 to train aspiring finance professionals. His commitment to developing talent is reflected in the impactful training provided by The WallStreet School.

With over 21+ years of experience in investment banking, consultancy, and advisory roles, Manoj has a strong background in strategic consultancy, valuation, and private equity. He has worked with top firms like Goldman Sachs and Bennett Coleman, and co-founded ARC Financial Services. In 2009, Manoj also co-founded The WallStreet School to train and equip aspiring finance professionals with essential skills for success in the industry.



## The CFP® Certification Program

The CERTIFIED FINANCIAL PLANNER (CFP®) certification is a globally recognized credential in financial planning, equipping professionals to manage clients' financial futures. In India, it's managed by the FPSB India, which promotes and oversees the certification, ensuring adherence to global standards of ethics and practice.

The CERTIFIED FINANCIAL PLANNER (CFP®) credential is the gold standard in financial planning, covering key areas like investments, tax planning, retirement, and estate planning, and is recognized worldwide.

Globally  
Recognized

The CFP® program equips professionals with in-depth knowledge in personal finance, enabling them to offer expert advice on managing wealth, investments, and long-term financial goals for individuals and families.

Comprehensive  
Knowledge

CFP® professionals adhere to a strict code of ethics and practice standards, building trust and ensuring clients receive ethical, client-centric financial advice.

Ethics  
and  
Professionalism

CFP® certification enhances career prospects, opening doors to roles in wealth management, financial advisory, and private banking, and often leads to higher earning potential and greater industry recognition.

Career  
Advancement

## Eligibility & Careers

The CFP® certification is designed for professionals who want to build or advance their careers in financial planning and wealth management. It is ideal for individuals who wish to provide comprehensive financial advice and manage client portfolios across various areas such as investments, retirement planning, tax management, and estate planning.

- Graduates (Bachelor's Degree) or those pursuing a bachelor's degree in any discipline.
- Professionals working in fields such as banking, investment advisory, insurance, wealth management, or financial services.
- Individuals looking to enhance their knowledge and skills in personal finance, financial analysis, and client engagement.
- Anyone with a strong interest in financial planning, even career switchers aiming to enter the finance industry, can pursue the certification.

**After earning the CFP® certification, a wide range of career opportunities opens up:**

- **Financial Planner:** Work directly with clients to create personalized financial plans.
- **Wealth Manager:** Advise high-net-worth individuals on managing their wealth and financial strategies.
- **Investment Advisor:** Provide guidance on investments, asset allocation, and portfolio management.
- **Tax Planner:** Specialize in tax-saving strategies and manage tax-efficient portfolios.
- **Retirement Planning Specialist:** Help clients design secure and sustainable retirement plans.
- **Estate Planner:** Offer advice on wealth transfer and estate management.
- **Insurance Advisor:** Advise on risk management strategies and recommend appropriate insurance policies.
- **Private Banker:** Provide personalized financial services to high-net-worth individuals.
- **Compliance Officer:** Ensure financial institutions follow regulatory and ethical standards.
- **Corporate Finance Manager:** Lead financial planning and management efforts for businesses.

## Placement Assistance Service

Our Placement Assistance Services are designed to support you in securing the best career opportunities after completing the CFP® certification program. We provide personalized guidance, including resume building, interview preparation, and career counseling, to help you navigate the job market with confidence.

Through our extensive network of industry partnerships, we connect you with leading financial firms and ensure you have access to numerous job openings. Our goal is to not only equip you with the skills but also to help you take the next step toward a successful career in financial planning.















Rigorous Training

Company Shortlisting & Selection



Mock Interviews & Resume Preparations

Since 2009, we have trained 50,826+ **students\*** in finance and accounting, with 11,870+ **successful placements\*** to date. Our extensive network includes partnerships with over 650+ **companies**, ensuring robust placement opportunities for our graduates.

 <b>Udit Dewan</b> Date: 25-Jan-2024 Pre TWSS: BBA Placement: Dalooop - Analyst	 <b>Prashant Kolash</b> Date: 21-Jan-2024 Pre TWSS: CFA Level II passed Placement: Incent Advisory Pvt L	 <b>Keshav Garg</b> Date: 04-Jan-2024 Pre TWSS: Business Analyst Placement: Decipher Financials - Finan Analyst	 <b>Jagdish G</b> Date: 03-Jan-2024 Pre TWSS: Equity Analysts Placement: Decipher Financials - Seni Analyst	 <b>Vinayak Gupta</b> Date: 03-Jan-2024 Pre TWSS: RSM US LLP Placement: RCPL - Associate	 <b>Bhupendra Sharma</b> Date: 28-Dec-23 Pre TWSS: Placement: Expert Global Consultant Private Limited	 <b>Bhawna arora</b> Date: 03-Jan-24 Pre TWSS: MBA, Placement: Decipher Financials-Seni analyst
 <b>Deepali Mehta</b> Date :27-Dec-23 Pre TWSS: PGDM, CFA L-2, Placement: ANACAP (Analyst)	 <b>Sakshi Garg</b> Date: 26-Dec-23 Pre TWSS: Assistant Marketing Manager Placement:Ascenrix Research pri LTD	 <b>Dimple Khatri</b> Date :25-Dec-23 Pre TWSS: Associate Accounts Execut Placement: WNS	 <b>Aman Srivastava</b> Date: 23-Dec-23 Pre TWSS: CA Inter Qualified Placement: Expert Global Consultant Associate	 <b>Arjun Kumar C A</b> Date :04-Oct-23 Pre TWSS: Accountant Placement: KPMG Global Services - Associate	 <b>Akshay Utarksh</b> Date :03-Oct-23 Pre TWSS: Relationship Manager, Placement: Niraga Capital - Senior Investment Banking Analyst	 <b>Tanya Gupta</b> Date :24-Dec-23 Pre TWSS: Graduated Placement: IDFC First Bank

As on 31st March 2025

## CFP® Learning Pathway

The CFP® certification offers two distinct learning pathways to accommodate different levels of education and professional experience: the Regular Pathway and the Fast Track Pathway.

### Regular Pathway

- This pathway is designed for individuals without prior financial qualifications. Candidates must complete FBSP registered program that covers all the core areas of personal financial planning, including:
- Personal Financial Management
- Investment Planning & Asset Management
- Risk Management & Insurance Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Regulatory Environment & Legal Compliance
- This program forms the foundation for your financial planning career and prepares you for the CFP® certification exam.

### Fast Track Pathway

- Designed for professionals with existing financial qualifications, such as CA, CFA, or MBA in Finance.
- Allows candidates to bypass certain education requirements, speeding up the certification process.
- Provides a direct route to the CFP® certification exam, reducing the time to certification
- Ensures essential areas of financial planning are still covered, maintaining the integrity and depth of knowledge needed for success.

The Fast Track Pathway allows qualified professionals to bypass 3 levels of certification exams for the CFP® certification exam while covering essential financial planning concepts.

## Your Advantage

At The WallStreet School (TWSS), our CFP® certification training is focused exclusively on live, interactive classroom sessions. We emphasize real-time learning with direct engagement between instructors and students, ensuring a thorough understanding of complex financial planning concepts. Our structured curriculum, combined with comprehensive mock tests and a strategic exam planner, provides a systematic approach to exam preparation. We also offer unlimited doubt-clearing sessions, ensuring continuous support throughout your learning journey, tailored to help you confidently prepare for the CFP® certification exam.



Experience our CFP® certification coaching through immersive live classroom sessions, designed for interactive and in-depth learning with expert instructors.

Assess your readiness through our comprehensive mock tests, carefully crafted to simulate real exam conditions, giving you a clear view of your strengths and areas to improve.

Tailor your learning experience with our exclusive live sessions, offering an interactive and personalized approach to help you grasp key financial planning concepts.

Streamline your CFP® certification exam preparation with our strategic study planner, allowing you to customize your learning schedule based on your progress and goals.

Gain clarity with unlimited doubt-clearing sessions, where our experienced instructors resolve your queries and ensure a solid understanding of complex topics.

Benefit from a user-friendly platform, providing seamless access to study materials, resources, and tools to support your CFP® certification learning journey.

## FAQ's

### **1. What is the CFP® certification and how can it benefit my career?**

The CFP® (CERTIFIED FINANCIAL PLANNER) certification is a globally recognized credential in personal financial planning. It enhances your expertise in areas like investment, tax, and retirement planning, and significantly boosts your credibility and career prospects in financial advisory and wealth management.

### **2. Who is eligible to pursue the CFP® certification?**

To pursue the CFP® certification, you must hold a bachelor's degree and complete the required financial planning education. Additionally, candidates must pass the CFP® certification exam and have relevant work experience in financial planning or advisory roles.

### **3. What is the duration of the CFP® certification program?**

The duration varies based on your prior qualifications. For beginners, the Regular Pathway may take 1-2 years, while experienced professionals in the Fast Track Pathway can complete it in a shorter time frame, depending on individual progress.

### **4. What kind of career opportunities can I expect after earning the CFP® certification?**

With CFP® certification, you can pursue roles such as financial planner, wealth manager, investment advisor, estate planner, and tax consultant. The certification is highly valued across the financial services sector, offering excellent growth potential and earning opportunities.

### **5. How does The WallStreet School support CFP® certification students with placements?**

We offer dedicated placement assistance, including resume building, mock interviews, and job referrals. With partnerships with over 450 companies, we connect you with potential employers and help you secure top career opportunities after completing the CFP® certification program.

### **6. What is the success rate of CFP® certification students at The WallStreet School?**

The WallStreet School boasts a significantly high pass rate for CFP® certification, reflecting our effective training, expert faculty, and personalized support to help you succeed in the exam and your career.

## CERTIFIED FINANCIAL PLANNER (CFP®) Certification Curriculum

### 1. Introduction to Financial Planning

This module introduces the key principles and fundamentals of personal financial planning, setting the foundation for the program.

Personal Financial Planning Process  
Financial Planning Approaches  
Time Value of Money  
Regulatory and Legal Framework for Financial Planning  
Ethical Standards and Professional Conduct

### 2. Risk Management and Insurance Planning

This module covers techniques for managing financial risks and the role of insurance in financial planning.

- Principles of Risk Management
- Types of Insurance (Life, Health, Property, and Casualty)
- Insurance Contracts and Policy Selection
- Insurance Needs Analysis
- Risk Assessment and Management

### 3. Investment Planning

This module focuses on investment strategies and portfolio management, preparing candidates to manage clients' investments effectively.

- Investment Principles and Concepts
- Asset Classes: Equity, Bonds, Mutual Funds, Real Estate, Commodities, and Alternatives
- Portfolio Management and Asset Allocation
- Investment Risk and Return

### 4. Tax Planning

This module teaches candidates how to help clients minimize tax liabilities and manage tax-efficient portfolios.

- Tax Structures in Personal Finance
- Taxation of Investments
- Tax Planning for Individuals, Families, and Businesses
- Tax Implications of Retirement and Estate Planning
- Tax Optimization Strategies

### 5. Retirement Planning

This module provides an in-depth understanding of retirement savings strategies and how to structure retirement plans for clients.

- Retirement Needs Analysis
- Retirement Savings Vehicles (Pension Plans, 401(k), IRAs, Annuities)
- Social Security and Government Benefits
- Strategies for Retirement Income Distribution
- Taxation and Inflation in Retirement Planning

### 6. Estate Planning

This module addresses the legal and financial aspects of transferring wealth to future generations.

- Wills, Trusts, and Estate Documents
- Wealth Transfer and Gifting Strategies
- Estate Tax Planning
- Power of Attorney and Guardianship
- Probate and Non-probate Transfers
- Charitable Giving and Philanthropy

### 7. Financial Plan Construction and Monitoring

This module is the capstone of the curriculum, combining knowledge from all previous modules to construct a comprehensive financial plan.

- Creating financial plans
- Setting financial goals
- Evaluating and revising strategies
- Managing client relationships
- Analyzing case studies
- Using financial planning tools

### 8. Ethics and Professional Standards

This module ensures candidates adhere to the highest ethical standards and professional guidelines as outlined by the CFP® certification board.

- CFP certification Board's Code of Ethics and Standards of Conduct
- Fiduciary Responsibility
- Client Confidentiality and Conflict of Interest
- Ethical Decision Making in Financial Planning
- Regulatory and Compliance Considerations

The final component of the CFP® certification curriculum is the Case Study and Capstone Project, where candidates apply learned concepts to real-life scenarios, including client profiling, financial plan creation, presentation, and integration.

## The CFP® Program Framework

### **Level I: FPSB® Investment Planning Specialist**

- Module 1: Personal Financial Management
- Module 2: Investment Planning & Asset Management
- Module 3: Regulatory Environment & Legal Compliances

### **Level II: FPSB® Retirement & Tax Planning Specialist**

- Module 1: Retirement Planning
- Module 2: Tax Planning

### **Level III: FPSB® Risk & Estate Planning Specialist**

- Module 1: Risk Management & Insurance Planning
- Module 2: Estate Planning

### **CFP® Final: FPSB® CFP®**

- Module 1: Financial Planning Process & Skills
- Module 2: Engaging Clients in Financial Planning
- Module 3: Integrated Financial Planning
- Case Study & Capstone Project

## Fuel That Drives Us: Our Testimonials

The WallStreet School's approach to teaching CFP® is highly practical and results-driven. The placement opportunities they provided were a great stepping stone for my career in financial planning.

**Shweta Bhatt**

★★★★★

Choosing The WallStreet School for CFP® certification was one of the best decisions I made. Their practical approach to teaching and strong support system helped me clear the exam with ease.

**Kavita Bansal**

★★★★★

The practical case studies and mock exams really helped me understand complex financial planning concepts. The WallStreet School is the best choice for anyone serious about a career in financial planning.

**Neha Agarwal**

★★★★★

Clearing the CFP® exam seemed daunting, but The WallStreet School's structured approach made it manageable. Their excellent support system ensured I stayed on track throughout the course.

**Ravi Kumar**

★★★★★

The WallStreet School's CFP® program gave me the confidence and knowledge to take my financial planning career to the next level. The live sessions and mock exams were incredibly helpful in clearing the exam on my first attempt.

**Rahul Mehta**

★★★★★

I was able to switch careers into financial advisory after completing the CFP® course at The WallStreet School. Their practical approach and excellent faculty made all the difference.

**Priya Sharma**

★★★★★

CFP® was a turning point in my career, helping me transition into a private banking role. The practical knowledge in financial planning and the support from instructors at TWSS gave me the confidence to excel in my new position.

**Rahul Kapoor**

★★★★★

The CFP® program equipped me with the skills and knowledge to advance in my insurance career. The practical insights were key to my professional growth. Thank you TWSS

**Syed Waqar**

★★★★★

I struggled with managing my business's finances, but the CFP® program gave me the knowledge and confidence to make informed decisions. Now, I'm better prepared for financial challenges. All thanks to TWSS.

**Ankush Oberoi**

★★★★★

# NEXT Step



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If you have any questions about the CFP® certification qualification, need personalized guidance, want free career counseling, inquire about course pricing, or talk about your career growth in general, don't hesitate to contact us at the number or email provided above!



# REACH us at



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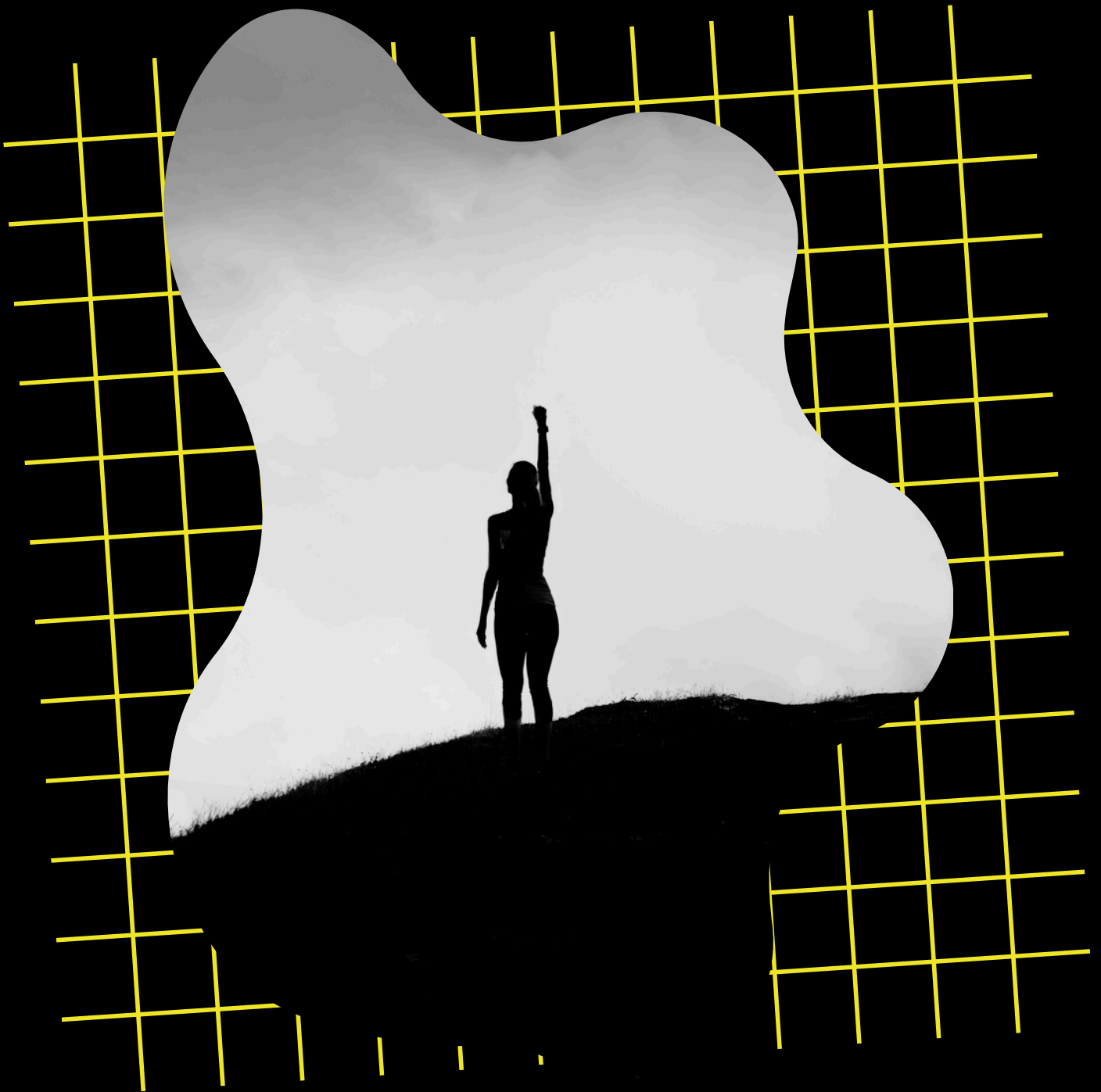
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# Igniting Financial Brilliance, One Student at a Time.



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