The WallStreet® School | INDIA
SINCE 2009

CERTIFIED FINANCIAL PLANNER®

Course Brochure

CFP®

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

CFP Certification @ TWSS

- Globally Recognized Certification
- World-Class CFP® Network
- Career Ready Certification
- Practical CFP® Training
- 91% Success Rate
- Strategic Wealth Planning

The globally recognized gold standard in personal financial planning, CFP® builds advanced expertise in financial planning, portfolio and investment management, and is trusted across 27+ countries including the US, UK, Canada, and Australia.

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.

Why Certified Financial Planner (CFP®) Certification

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- #1 Personal Finance Qualification
- 6 Months to 1 Year
- 70% Higher Salary
- Career Advancement
- Entrepreneurship in Financial Advisory
- High Passing Rate - Upto 70% result
- Multiple Career Options

The Rising Demand for CFP® Certification

Register

Basics of Personal Finance

Specialist Exams (Investment, Retirement & Tax, Risk & Estate)

Integrated Financial Planning & Financial Plan Construction

Gain relevant Work Experience

CFP® Certified

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 CFP® credential is the global gold standard in financial planning—covering investments, taxes, retirement, and estate planning.

The CFP® program builds deep expertise in personal finance, empowering professionals to guide individuals and families in managing wealth and long-term goals.

CFP® professionals follow strict ethics and standards to deliver trusted, client-first financial advice.

CFP® certification boosts careers with roles in wealth management, advisory, and private banking—offering higher pay and industry recognition.

Globally Recognized

Comprehensive Knowledge

Ethics and Professionalism

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.

CFP®

Opportunities After Certification

- **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.

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.

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!

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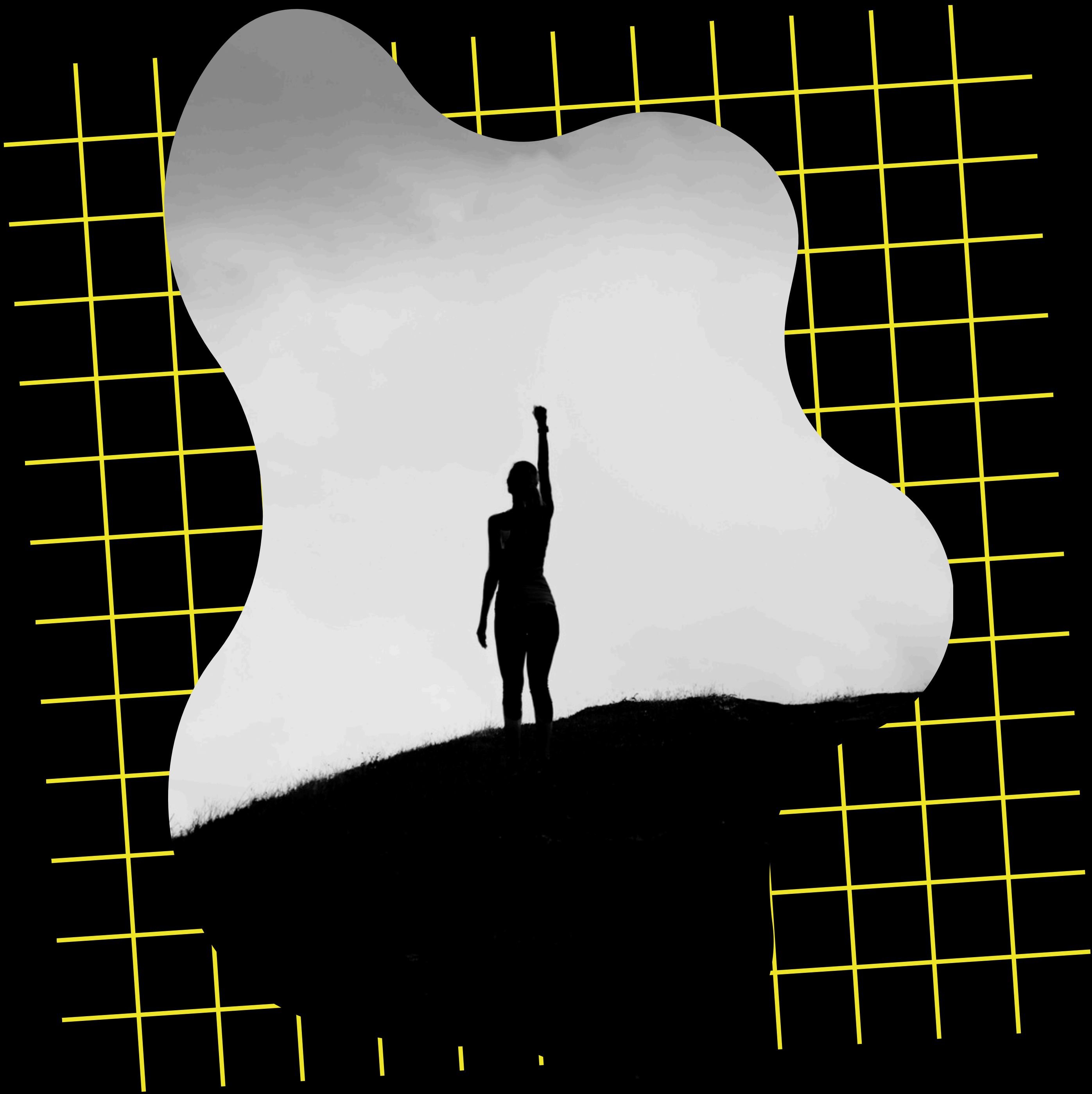
Igniting Financial Brilliance, One Student at a Time.



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