

CERTIFIED FINANCIAL PLANNER (CFP) CERTIFICATION



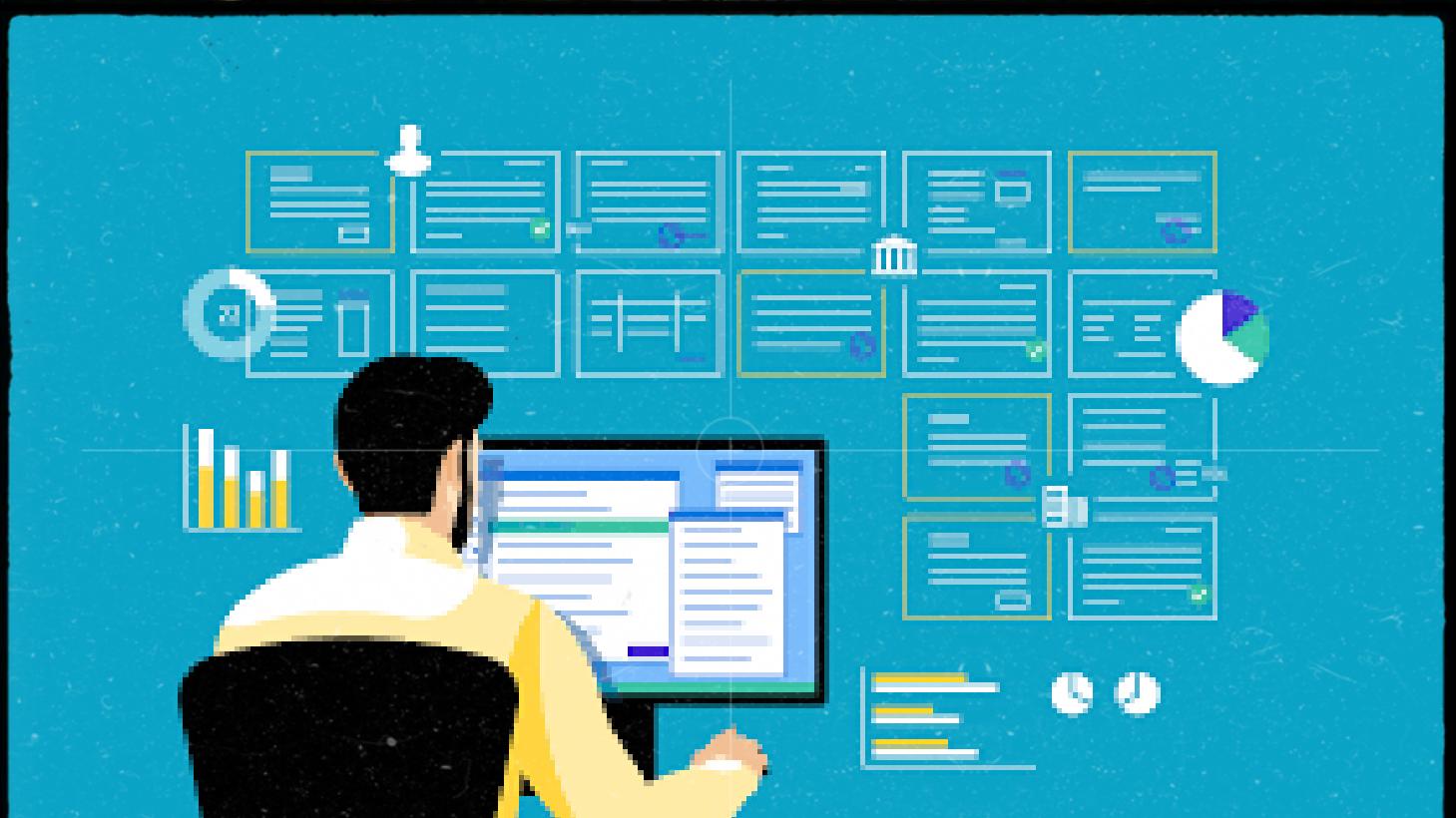
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Introduction to CFP Certification

The Certified Financial Planner (CFP)

Certification course teaches skills in financial planning, analysis, and advice. The program covers eight principal knowledge domains, such as financial statement analysis, investment planning, retirement planning, estate planning, and professional ethics. The course prepares you for the CFP exam, which requires a bachelor's degree or equivalent, passing three levels of exams, completing four years of relevant work experience, and adhering to the CFP Board Code of Ethics and Standards of Professional Conduct. The CFP certification can enhance your job prospects and demonstrate your expertise in financial planning. Upon completion of the course, you will receive a certificate of completion.



Why Choose Chools?

Numbers That Speak for Themselves:

- **10,000+ Successful Alumni:** Join a network of impactful professionals.
- **95% Job Placement Rate:** Secure your future with Chools' proven track record.
- **20+ Years of Excellence:** Trust in a legacy of education and industry expertise.
- **200+ Industry Partnerships:** Leverage our connections for real-world insights and opportunities.

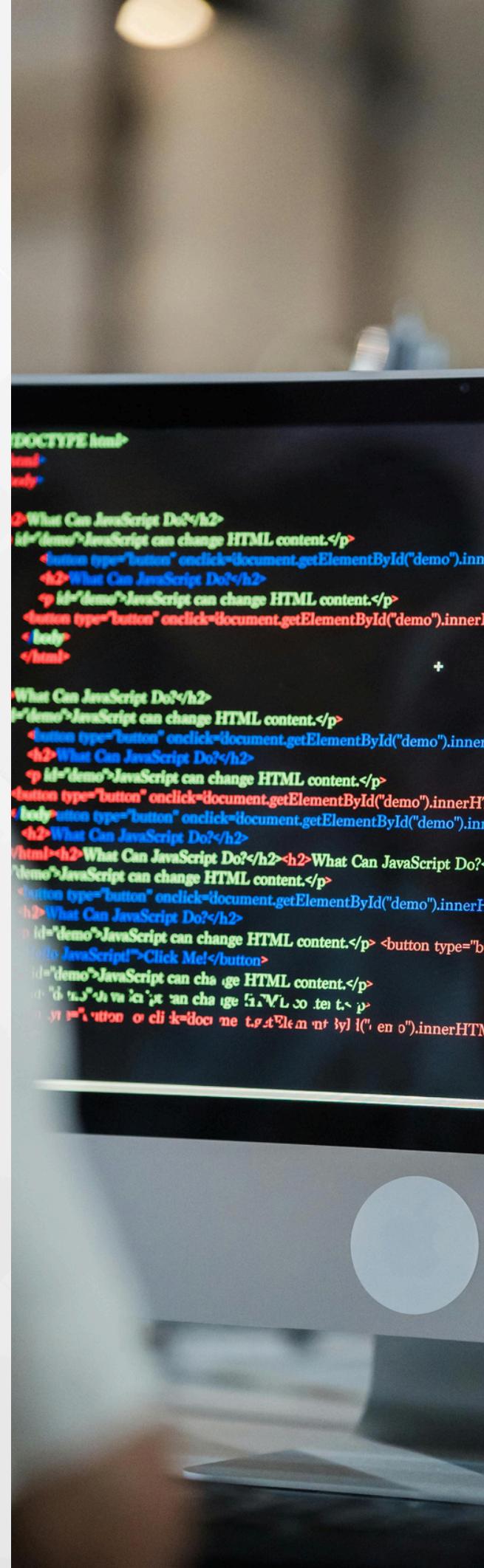
What Sets Us Apart?

- **Expert Instructors:** Learn from industry veterans with hands-on experience.
- **Hybrid Learning Model:** Balance online flexibility with in-person engagement.
- **Comprehensive Curriculum:** Stay ahead with courses designed to meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

Who Can Apply?

Eligibility Criteria:

- You must have a bachelor's degree or be in the final year of your degree program.
- You must have at least 150 semester hours of college credit, including a



- You must have at least one or two years of relevant work experience under a CFP.
- You must pass all four sections of the Uniform CPA Exam, which cover topics such as auditing, financial accounting, regulation, and business concepts.
- You must join the state board of accountancy and agree to follow its rules and ethics

Program Overview

The CFP Certification Program provides a comprehensive education in financial planning. Our curriculum covers a wide range of topics to ensure a thorough understanding, combining theoretical knowledge with practical, hands-on experience.

Learning Mode:

- **Hybrid Learning Model:** Combines online learning with in-person sessions for flexibility and interactive engagement.
- **Interactive Sessions:** Includes live webinars, workshops, and Q&A forums with expert instructors and peers.
- **Self-paced Learning:** Access course materials anytime, allowing you to learn at your own pace.



PROGRAM OBJECTIVES

- Prepare to take the CFP exam and earn the CFP certification.
- Understand the principles and practices of financial planning and analysis.
- Develop techniques for investment planning and management.
- Learn how to create effective retirement and estate plans.
- Understand professional ethics and standards in financial planning.
- Apply ethical standards and professional conduct in financial planning.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in financial planning and analysis.

EXPECTED OUTCOMES

- Proficiency in financial planning and analysis principles and techniques.
- Practical experience through hands-on exercises.
- Strong analytical and problem-solving skills.
- Application of best practices in financial planning and analysis.
- Innovation in understanding and managing financial plans.

SKILLS LEARNED

- **Financial Statement Analysis:** Techniques for analyzing financial statements.
- **Investment Planning:** Understanding investment planning and management.
- **Retirement Planning:** Developing skills in retirement planning.
- **Estate Planning:** Learning about estate planning strategies.
- **Ethics:** Applying ethical standards and professional conduct in financial planning.
- **Strategic Thinking:** Developing and implementing strategic initiatives for financial planning.
- **Decision-Making:** Making informed decisions based on financial planning insights.
- **Communication Skills:** Enhancing communication and interpersonal skills.

Program Outline

Stage 1: Foundations of Financial Planning and Ethics

Module 1: Introduction to CFP and Ethics

- Understanding the CFP program and ethical standards

Module 2: Professional Conduct and Ethics

- Ethical behavior and professional conduct in financial planning

Module 3: Financial Statement Analysis I

- Basics of financial statement analysis

Module 4: Financial Statement Analysis II

- Advanced financial statement analysis techniques

Module 5: Investment Planning I

- Introduction to investment planning principles

Stage 2: Advanced Financial Planning and Analysis

Module 6: Investment Planning II

- Advanced investment planning strategies

Module 7: Retirement Planning I

- Basics of retirement planning

Module 8: Retirement Planning II

- Advanced retirement planning techniques

Module 9: Estate Planning I

- Fundamentals of estate planning

Module 10: Estate Planning II

- Advanced estate planning strategies

Stage 3: Specialized Financial Planning Areas

Module 11: Tax Planning I

- Basics of tax planning and strategies

Module 12: Tax Planning II

- Advanced tax planning techniques

Module 13: Risk Management I

- Fundamentals of risk management

Module 14: Risk Management II

- Advanced risk management strategies

Module 15: Insurance Planning I

- Basics of insurance planning

Stage 4: Advanced Insurance and Professional Standards

Module 16: Insurance Planning II

- Advanced insurance planning techniques



Program Outline

Module 17: Professional Standards I

- Understanding professional standards and ethics in financial planning

Module 18: Professional Standards II

- Applying ethical standards and professional conduct

Module 19: Behavioral Finance

- Understanding investor behavior and its impact on financial planning

Module 20: Client Relationship Management

- Techniques for managing client relationships

Stage 5: Exam Preparation and Review

Module 21: Exam Preparation I

- Comprehensive review of financial planning topics

Module 22: Exam Preparation II

- Practice exams and case studies

Module 23: Exam Strategies I

- Techniques for approaching the CFP exam

Module 24: Exam Strategies II

- Final review and exam preparation strategies

Module 25: Final Exam Preparation

- Intensive review and preparation for the CFP exam

Enrollment Now Open!

Take the first step towards mastering financial planning. Enroll in our **Certified Financial Planner (CFP) Certification** Program and enhance your career with Chools.



Program Outline

Module 16: Ethics and Governance II

Advanced governance and ethical standards in government financial management.

Enrollment Now Open!

Take the first step towards mastering government financial management and earning your CGFM credential. Enroll in our **Certified Government Financial Manager (CGFM)** Program and enhance your career with Chools.