

# **Finance and Banking**

## **Certified Financial Planner (CFP) Certification**

### **Curriculum**

#### **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

### **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



Websites:

- <https://chools.in/>
- <https://ramaqschools.com/>
- <https://www.choolsgroup.com/>