

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://ramaqchools.com/>
- <https://www.choolsgroup.com/>