

CHARTERED FINANCIAL CONSULTANT (CHFC)



**Ramaq
Chools**
Consulting & Training

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Contents

- 1. Introduction to Chartered Financial Consultant**
- 2. Why Choose Chools**
- 3. Who Can Apply?**
- 4. Program Overview**
- 5. Program Objectives and Expected Outcomes**
- 6. Skills Learned**
- 7. Program Outline**
- 8. Enrollment Information**



Introduction to Chartered Financial Consultant

Imagine yourself at the pinnacle of financial advising, armed with comprehensive knowledge and skills that cover the full spectrum of financial planning. The Chartered Financial Consultant (ChFC) designation is tailored for financial advisors looking to deepen their expertise in areas such as insurance, investment management, retirement planning, estate planning, income taxation, and ethics. This course equips you with the necessary tools and prepares you thoroughly for the ChFC exam and certification.





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.

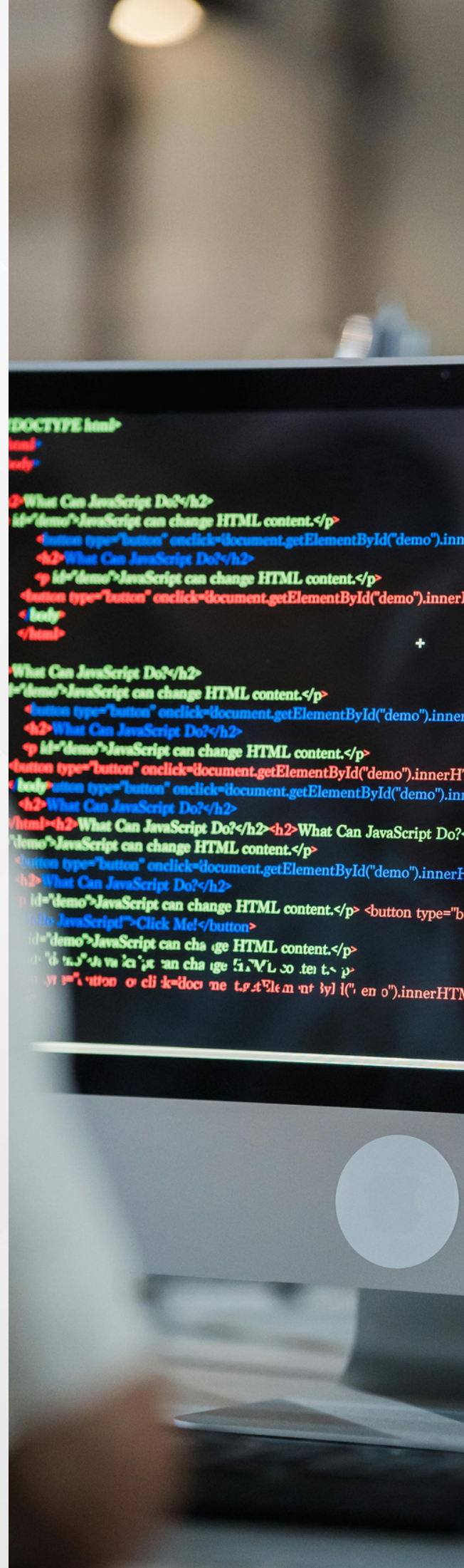
What Sets Us Apart?

- **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 meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

Who Can Apply?

Eligibility Criteria:

- Bachelor's degree or 2,000 hours of financial services work experience.
- Completion of a study program, which consists of six modules and a written case study.



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- Passing three online exams with a score of at least 80% to earn the ChFC credential.

Program Overview

The ChFC Program provides a comprehensive education in various aspects of 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

- Build knowledge and skills in insurance, investment management, and retirement planning.
- Understand estate planning, income taxation, and professional ethics.
- Prepare for the Chartered Financial Consultant (ChFC) exam.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in financial advising.

EXPECTED OUTCOMES

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

SKILLS LEARNED

- **Insurance:** Techniques for managing insurance policies and risk.
- **Investment Management:** Strategies for managing investments and portfolios.
- **Retirement Planning:** Planning for clients' retirement goals and needs.
- **Estate Planning:** Understanding and implementing estate planning strategies.
- **Income Taxation:** Techniques for managing income taxes effectively.
- **Professional Ethics:** Understanding and applying ethical standards in financial advising.
- **Strategic Thinking:** Developing and implementing strategic financial initiatives.
- **Decision-Making:** Making informed decisions based on financial analysis.
- **Communication Skills:** Enhancing communication and interpersonal skills in financial advising contexts.



Program Outline

Required Core Modules

Module 1: Introduction to Financial Planning

- Basics of financial planning and its importance.

Module 2: Insurance I

- Techniques for managing insurance policies and risk.

Module 3: Insurance II

- Advanced insurance management strategies.

Module 4: Investment Management I

- Strategies for managing investments and portfolios.

Module 5: Investment Management II

- Advanced investment management techniques.

Module 6: Retirement Planning I

- Planning for clients' retirement goals and needs.

Module 7: Retirement Planning II

- Advanced retirement planning strategies.

Module 8: Estate Planning I

- Understanding and implementing estate planning strategies.

Module 9: Estate Planning II

- Advanced estate planning techniques.

Module 10: Income Taxation I

- Techniques for managing income taxes effectively.

Module 11: Income Taxation II

- Advanced income taxation strategies.

Module 12: Professional Ethics I

- Understanding and applying ethical standards in financial advising.

Module 13: Professional Ethics II

- Advanced ethical standards and professional conduct.

Module 14: Scenario and Sensitivity Analysis I

- Basics of performing scenario and sensitivity analysis.

Module 15: Scenario and Sensitivity Analysis II

- Advanced scenario and sensitivity analysis techniques.



Program Outline

Module 16: Case Studies and Practical Applications

- Real-world case studies and practical applications in financial planning.

Enrollment Now Open!

Take the first step towards mastering financial planning and earning your ChFC credential. Enroll in our **Chartered Financial Consultant (ChFC)** Program and enhance your career with Chools.