Finance and Banking

Certified Public Accountant and Personal Financial Specialist (CPA and PFS)

<u>Curriculum</u>

Program Outline

Module 1: Introduction to Personal Financial Planning

- Basics of personal financial planning and its importance.

Module 2: Tax Planning I

- Techniques for effective tax planning and management.

Module 3: Tax Planning II

- Advanced tax planning strategies.

Module 4: Retirement Planning I

- Strategies for planning clients' retirement goals and needs.

Module 5: Retirement Planning II

- Advanced retirement planning techniques.

Module 6: Estate Planning I

- Understanding and implementing estate planning strategies.

Module 7: Estate Planning II

- Advanced estate planning techniques.

Module 8: Investment Planning I

- Techniques for managing investments and portfolios.

Module 9: Investment Planning II

- Advanced investment management strategies.

Module 10: Risk Management I

- Understanding and managing financial risks.

Module 11: Risk Management II

- Advanced risk management techniques.

Module 12: Education Planning I

- Strategies for planning educational expenses and funding.

Module 13: Education Planning II

- Advanced education planning techniques.

Module 14: Professional Ethics I

- Understanding and applying ethical standards in financial planning.

Module 15: Professional Ethics II

- Advanced ethical standards and professional conduct.

Module 16: Scenario and Sensitivity Analysis I

- Basics of performing scenario and sensitivity analysis.

Websites:

- https://chools.in/
- https://ramaqchools.com/
- https://www.choolsgroup.com/