Finance and Banking

Personal Financial Specialist (PFS)

Curriculum

Program Outline

Module 1: Introduction to Personal Financial Planning

- Basics of personal financial planning and its importance.

Module 2: Estate Planning I

- Techniques for planning and managing estates.

Module 3: Estate Planning II

- Advanced estate 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: Investing I

- Understanding and implementing investment strategies.

Module 7: Investing II

- Advanced investment management techniques.

Module 8: Insurance I

- Techniques for managing insurance policies and risk.

Module 9: Insurance II

- Advanced insurance management strategies.

Module 10: Tax Strategies I

- Effective tax planning and management.

Module 11: Tax Strategies II

- Advanced tax strategies and techniques.

Module 12: Professional Ethics I

- Understanding and applying ethical standards in financial planning.

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.

Module 16: Case Studies and Practical Applications

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

Websites:

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