NFP ProMembership Schedule 2021

1) List of topics shared below are representative of what to expect. Actual sessions may vary
2) The sessions will be covered during the year FY 2021-22 as & when we have trainers / content for same
3) Each session will be of around one hour which members may attend live or recordings

S.No.	Tentative Topics for Year 2021 (52 Weeks)	Category in Nine Step Blueprint
1	Best practices for **Onboarding New Clients** with Templates - Welcome Email, Checklist, Timelines	Process
2	Building a effective **remuneration system** for your team members. How much to pay to attract and retain talent.	Team
3	Building an Annual **Client Engagement Calendar** with an objective of 'Clients for Life' approach.	Retain
4	Demo of 25 most useful **Excel Functions and Shortcuts** for financial advisors to increase your productivity	Technology
5	Demonstration - How to conduct a **Risk Profile Questionnaire** Meeting with Clients	Process
6	**Documenting Stories** from own life & practice which can be used in Client Communication.	You
7	Effective usage of **Social Media** by Financial Advisors - Facebook, Linkedin, Twitter, Instagram and Youtube.	Technology
8	Framework & sources to analyse and compare **Health Insurance products** available in the marketplace.	Products
9	Framework and case studies on **Practice Succession** for ageing financial advisors (beyond 50 years)	You
10	Framework and steps to hold Annual **Investment Porfolio Review** process for all your clients.	Service
11	Framework to help Clients with evaluate and say 'Yes/No' to **Real Estate Opportunities**.	Products
12	Framework to systematically analyse **Mutual Fund Factsheet** - Equity Funds, Debt Funds & Hybrid Funds.	Products
13	How to analyze and compare most relevant Ratios to **Evaluate Mutual Funds**	Products
14	How to become a pro at **Handling Client Objections** with list of common objections and possible answers	Service
15	How to best schedule your day for **Effective time management** - Setting ToDoList, Weekly Targets & Monthly Reviews	You
16	How to build a **Marketing Funnel** to systematically acquire clients from the Natural Market.	Acquire
17	How to build a **Referral System** within your client engagement strategy to generate referral on a regular basis.	Acquire

S.No.	Tentative Topics for Year 2021 (52 Weeks)	Category in Nine Step Blueprint
18	How to build a simple a **CRM system** using Excel Templates for relationship driven solo practice.	Service
19	How to build your email list, nuture it with valuable content and acquire clients with **Email Marketing**	Acquire
20	How to cater to **NRI Clients** effectively with proper Client Servicing & Client Engagment strategies.	Service
21	How to conduct **Effective Online IAPs** - best practices, checklist and PPT framework	Acquire
22	How to design and prepare your **Client Meeting checklists** - Pre meeting, during meeting and post meeting.	Process
23	How to design organization strucutre and job profiles for **Team Building** in a financial advisory firm	Team
24	How to develop a **Career Growth Plan** for your team members leading to partnership in your firm.	Team
25	How to effectively onboard a **New Team Member** - process, checklist and training.	Team
26	How to help **Clients with No Goals** - different techniques, pitch and strategies to keep client invested	Service
27	How to incorporate **Life Coaching process** into your financial advisory practice	Retain
28	How to incorporate **Life Planning approach** in your practice - Popular models to follow from across the world.	Retain
29	How to make the best use of **CAMS & KARVY platforms** for effective reports and analysis	Technology
30	How to set up Monthly & Annual Income Streams for **Retired Clients** in Distribution Phase.	Solutions
31	How to set-up and run **FaceBook Ad Campaigns** with micro budgets (less than 500 per day) for financial advisors.	Acquire
32	How to Track and Monitor **Debt Markets** to recommend and manage a Debt Portfolio Clients.	Products
33	How to transition existing clients to relationship clients trusting us with **100% Wallet Share**	Retain
34	How, Why and When to set-up a Trust as part of **Succession Planning** for HNI Clients.	Solutions
35	Long term implications of **Tax Planning avenues** - 80 C & Beyond 80C	Solutions

S.No.	Tentative Topics for Year 2021 (52 Weeks)	Category in Nine Step Blueprint
36	Must have **Technologies to Scale Up** your financial advisory practice to Multi-Consultant set-up.	Technology
37	Opportunity analysis and how register as a **PFRDA Retirement Adviser** and add NPS to your product basket.	Products
38	Opportunity analysis, Income potential and process to add **AIFs (Alternative Investment Funds)** in your product basket	Products
39	Opportunity analysis, Income potential and process to start **Stock Broking / Advisory** practice.	You
40	**Personal Brand building** for financial advisors in the online world - Your first impression when prospects search for you.	Acquire
41	Process, income potential and opportunity analysis for building a **Home Loan Consultancy** practice.	Solutions
42	Products and platforms to get exposure to **international markets** in Client's investment portfolio	Solutions
43	Scope, Opportunity and Ways to tap into the lucrative **NRI Market** and get started with NRI Practice.	Acquire
44	Should you add **Index Funds & Passive Investing** to your Product Basket - Why and How are advisors considering this segment?	Products
45	Sources and templates to track and analyse **Macro Economic Indicators** impacting Client's Investment Portfolio	Process
46	Specific Techniques to identify and overcome **Investor Biases** to help Clients remain invested for Long Term.	Retain
47	Step by Step process to register as a **SEBI Registered Investment Advisor (RIA)**	You
48	Structure and elements of **Letter of Engagement** as per the requirements of SEBI RIA regulations	Process
49	The Pros & Cons of **Structuring a Partnership / LLP Firm** - Legalities, Responsibilities, Payouts	You
50	Understanding various **Asset Allocation Strategies** - How to decide the right asset mix for various set of clients	Solutions
51	Understaning and comparison of Investment oriented **Life Insurance Plans** - Does it make sense to recommend?	Products
52	When is the right time to **Re-shuffle the portfoio** and How to change the asset allocation?	Solutions