



PROMember[®]

Knowledge Driven Professionals

NFP ProMembership Program

India's Largest Community of
Personal Finance Professionals (PFPs)



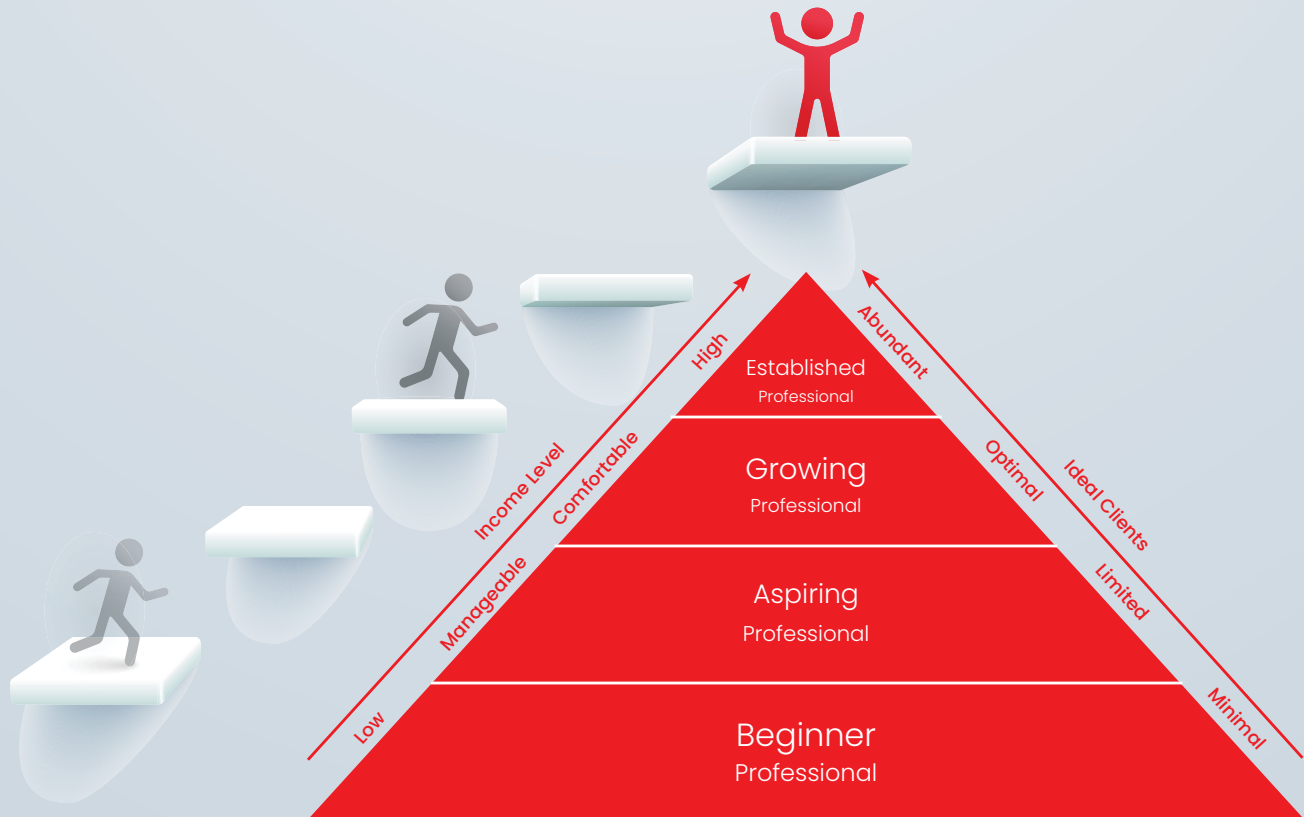
GROW



Grow Competency
Grow Credibility

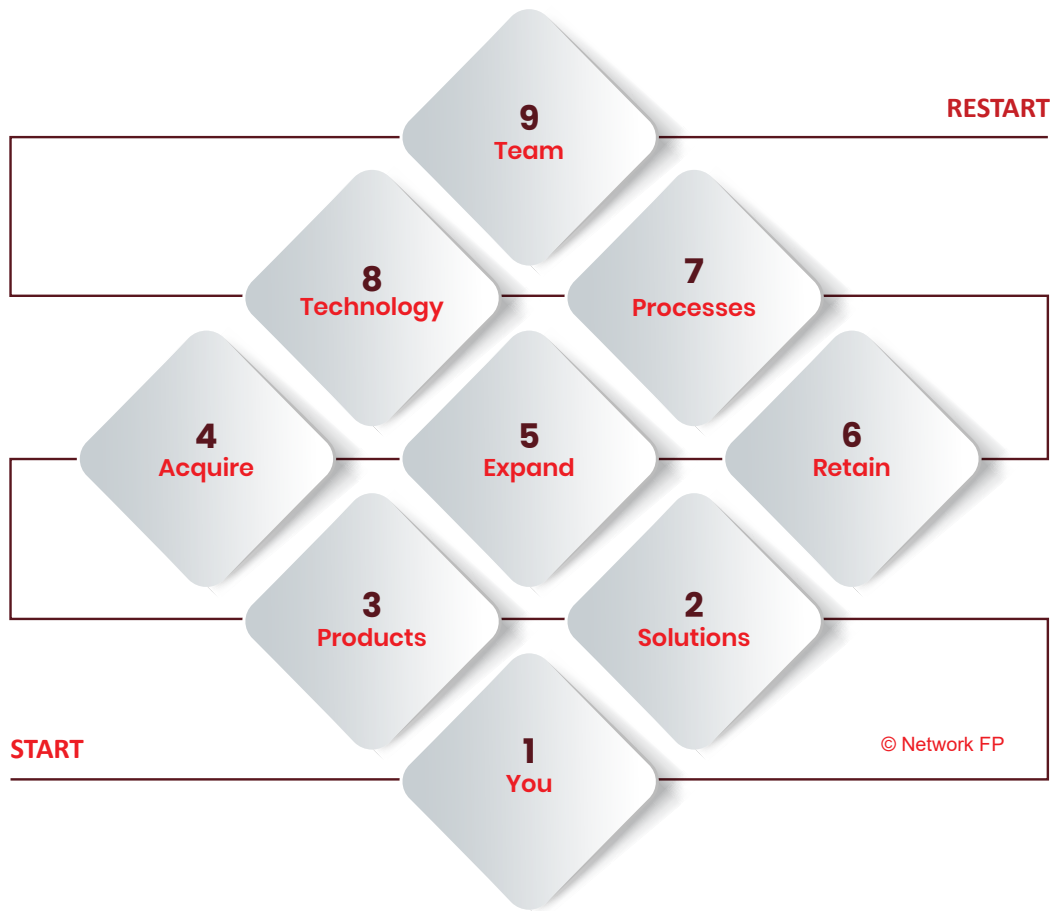
Learning Never Stops... Growing Never Ends...

NFP ProMembership helps you grow your career, practice or business continuously by helping you grow your competency and credibility. Which ultimately helps you to grow your clients and your income.



PFP Success Blueprint

Gain insights, learn strategies, get resources on the 9 core steps to build, grow and become a successful Personal Finance Professional (PFP).



NFP ProMembership Benefits

NFP ProMembers get to use and benefit from the following 9 Membership benefits to build and grow their profession systematically.



UpSkills



ProTools



Exchange



Resources



**Client
Connect**



Quizzes



Events



Profile



Directory

PFP Body of Knowledge

Various knowledge initiatives for ProMembers cover the entire Body of Knowledge required for being a Personal Finance Professional.

Self Development

- 1 Career Growth Clarity
- 2 Communication Skills
- 3 Personal Productivity
- 4 Mindset and Attitude
- 5 Ethics and Integrity
- 6 Relationship Management Skills

Personal Finance Solutions

- 1 Asset Allocation & Portfolio Building
- 2 Behavioural Finance & Investor Biases
- 3 Client Goals, Fears & Aspirations
- 4 Financial Planning
- 5 Investment Advisory
- 6 Life Planning and Coaching
- 7 NRI Financial Consultancy
- 8 Organizing Clients Financial Life
- 9 Personal Income Tax Planning
- 10 Retirement & Financial Freedom
- 11 Wealth Management
- 12 Wills, Trust & Estate Planning



Structured Knowledge Initiatives

All ProMembership benefits like UpSkill, ProTools, Exchange, Quizzes etc are structured around the Body of Knowledge that make up a professional domain for Personal Finance Professionals (PFPs).



Personal Finance Products

- 1 Bonds and Fixed Income Products
- 2 Direct Stocks and Portfolios
- 3 ETFs and Passive Investing
- 4 Gold & Commodities
- 5 Government Schemes - NPS & more
- 6 International Investing
- 7 Life Insurance & General Insurance
- 8 Loans - Home, Education, Car, LAS
- 9 Mutual Funds
- 10 P2P Lending and Investing
- 11 PMS & AIFs Investment
- 12 Real Estate, REITs, INVITs

Client Management

- 1 Client Engagement
- 2 Client Servicing
- 3 Investor Awareness Programs
- 4 Marketing & Branding
- 5 Sales & Client Acquisition
- 6 Client Communication

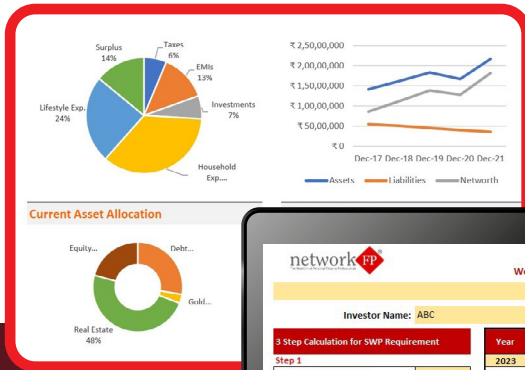
Practice Management

- 1 Compliance & Regulations
- 2 Operations and Standardization
- 3 Practice Succession Planning
- 4 Productivity Tools & Apps
- 5 Team Management
- 6 Technology & Softwares



NFP ProTools

NFP ProTools for ProMembers are advanced (beyond QPFF Program) ready-to-use tools, calculators, formats & templates for your practice and clients.



Financial Freedom Calculator

Wealth Creation through Growing SIP & Growing SWP

Enter value only in the coloured cells

Investor Name: ABC DOB: 03-Mar-80 Life Expectancy: 85 Current Age: 43

Step	Year	Year No.	Age	Amount in hand	Lumpsum Investments	Monthly SIP	Return	Monthly SWP	Lumpsum Withdrawal	Expected Corpus
Step 1	2023	1	43	₹ 10,00,000	₹ 60,000	11%	₹ 0	₹ 0	₹ 0	₹ 18,72,216
	2024	2	44	₹ 18,72,216	₹ 63,000	11%	₹ 0	₹ 0	₹ 0	₹ 28,78,487
	2025	3	45	₹ 28,78,487	₹ 66,150	11%	₹ 0	₹ 0	₹ 0	₹ 40,35,464
	2026	4	46	₹ 40,35,464	₹ 69,458	11%	₹ 0	₹ 30,00,000	₹ 23,61,725	₹ 35,47,993
	2027	5	47	₹ 23,61,725	₹ 72,930	11%	₹ 0	₹ 0	₹ 0	₹ 49,11,075
	2028	6	48	₹ 35,47,993	₹ 76,577	11%	₹ 0	₹ 0	₹ 0	₹ 64,72,746
	2029	7	49	₹ 49,11,075	₹ 80,408	11%	₹ 0	₹ 0	₹ 0	₹ 82,57,251
	2030	8	50	₹ 64,72,746	₹ 84,428	11%	₹ 0	₹ 0	₹ 0	₹ 1,02,91,689
	2031	9	51	₹ 82,57,251	₹ 88,647	11%	₹ 0	₹ 0	₹ 0	₹ 1,26,06,223
	2032	10	52	₹ 1,02,91,689	₹ 93,080	11%	₹ 0	₹ 0	₹ 0	₹ 1,53,75,840
Step 2	2033	11	53	₹ 1,26,06,223	₹ 0	8%	₹ 99,000	₹ 0	₹ 75,00,000	₹ 45,65,095
	2034	12	54	₹ 1,23,75,840	₹ 0	8%	₹ 1,03,950	₹ 1,09,148	₹ 0	₹ 35,64,443
	2035	13	55	₹ 45,65,095	₹ 0	8%	₹ 1,09,148	₹ 1,14,605	₹ 0	₹ 24,15,446
	2036	14	56	₹ 35,64,443	₹ 0	8%	₹ 1,14,605	₹ 1,20,335	₹ 0	₹ 11,02,822
	2037	15	57	₹ 24,15,446	₹ 0	8%	₹ 1,20,335	₹ 1,26,352	₹ 0	₹ 3,90,108
	2038	16	58	₹ 11,02,822	₹ 0	8%	₹ 1,26,352	₹ 1,32,669	₹ 0	₹ 303,523
	2039	17	59	₹ 3,90,108	₹ 0	8%	₹ 1,32,669	₹ 1,39,303	₹ 0	₹ 39,91,268
	2040	18	60	₹ -20,81,525	₹ 0	8%	₹ 1,39,303	₹ 1,46,268	₹ 0	₹ -61,40,952
	2041	19	61	₹ -39,91,268	₹ 0	8%	₹ 1,46,268	₹ 1,53,581	₹ 0	₹ -85,54,128
	2042	20	62	₹ -61,40,952	₹ 0	8%	₹ 1,53,581	₹ 0	₹ 0	₹ 0

PFF Revenue Projection Calculator

Gross & Net Revenue growth as a function of AUM

Current Year	2024
Target # of Years (Maximum of 20 Years)	10
Current AUM (in crores)	5.00
Current Monthly SIP	20,00,00,000
Average Yearly AUM Return %	11%
Yearly Growth in SIP	30%
Average Brokerage %	0.80%
Yearly AUM Withdrawal Percentage	10.00%
Lumpsum Yearly Target Percentage	5.00%
Expense Percentage	20.00%

Revenue (in Rs. Lakhs)

Net Revenue (in Rs. Lakhs)

Brokerage (in Rs. Lakhs)

Current AUM (in Rs. Lakhs)

© Network FIP Knowledge Solutions Pvt. Ltd. Only Network FIP ProMembers are licensed to use this calculator.



NFP Resources

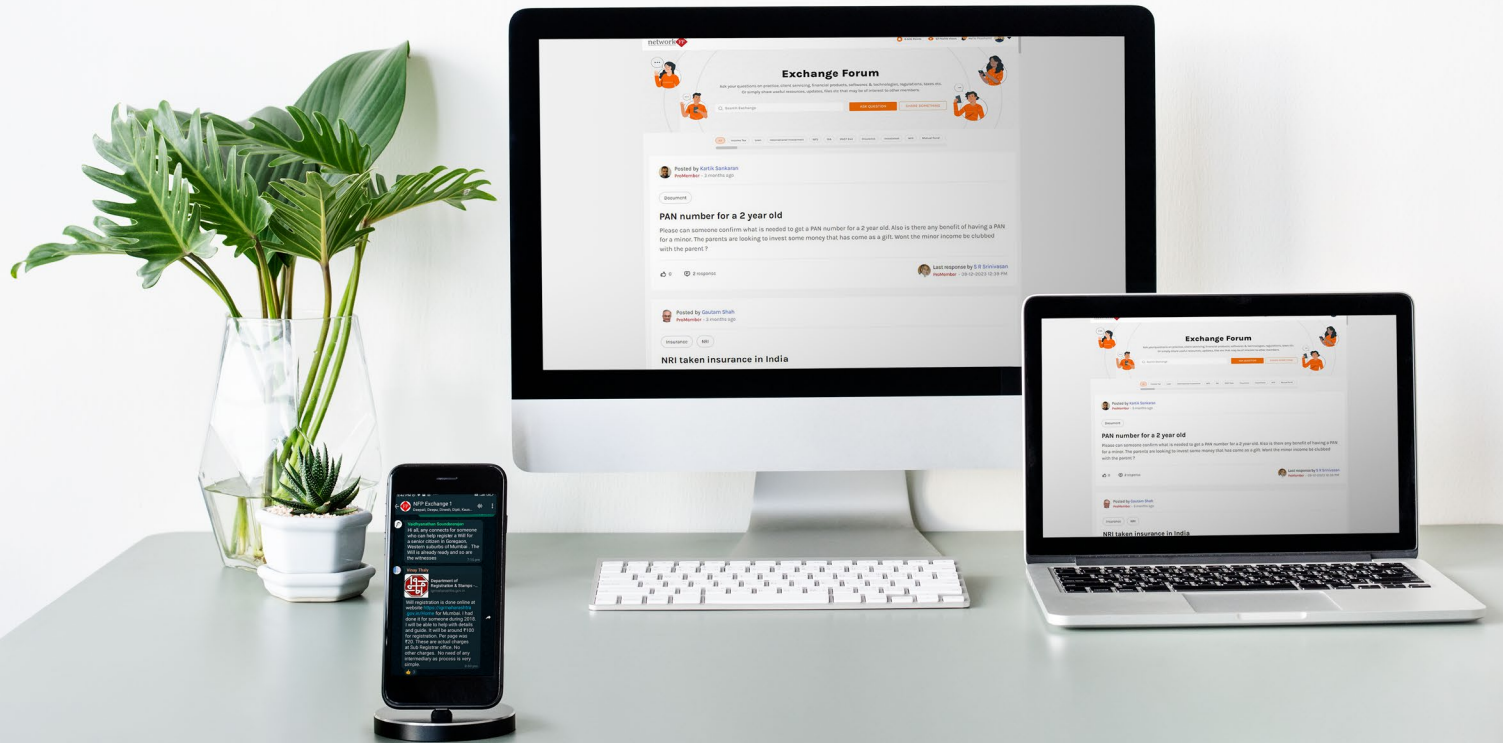
NFP Resources include Investor Awareness presentations and Industry guidelines and resources important for PFPs. Download, refer, use as per needs.





NFP Exchange

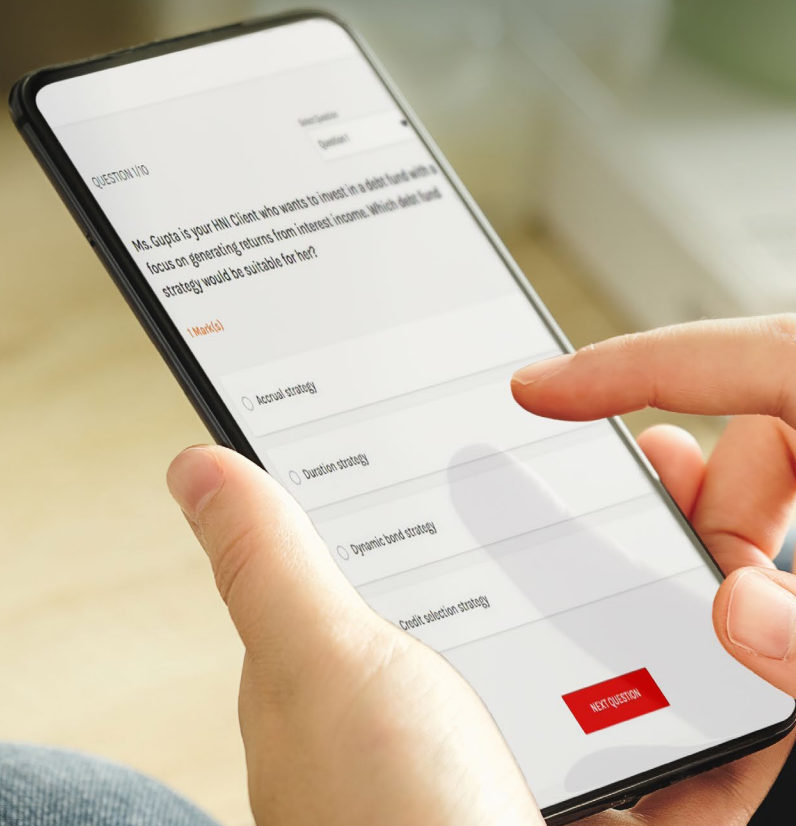
NFP Exchange is well moderated community Q&A forum on WhatsApp and Platform. Have a question? ASK. Help each other and get help from experts.





NFP Quizzes

NFP Quizzes help QFPF Certificants and other certificants to earn Annual Continuous Education (ACE) points required to maintain & renew your professional certifications.





ClientConnect

NFP ClientConnect are collection of images and videos which you can share with your clients and prospects to educate them and position yourself as an expert.

Why Goal-Based Investing is Important?



It's better to look ahead and prepare than to look back.
- Jackie Joyner-Kersey

What people think Financial Planning is:



What Financial Planning actually is:



Sovereign Gold Bonds

SGBs are like government-issued certificates that let you invest in gold and earn interest without needing to own physical gold.



Benefits:

No capital gain if held for **8 years**

No GST on purchase or sale

2.5 % yearly interest

Highly secure

When can you invest?
2nd Tranche
11th to 15th September

Who can invest?
Resident Indian, Trusts,
Universities, HUFs



"Invest with Confidence: SGB - Gold, Government-backed, and Growing."

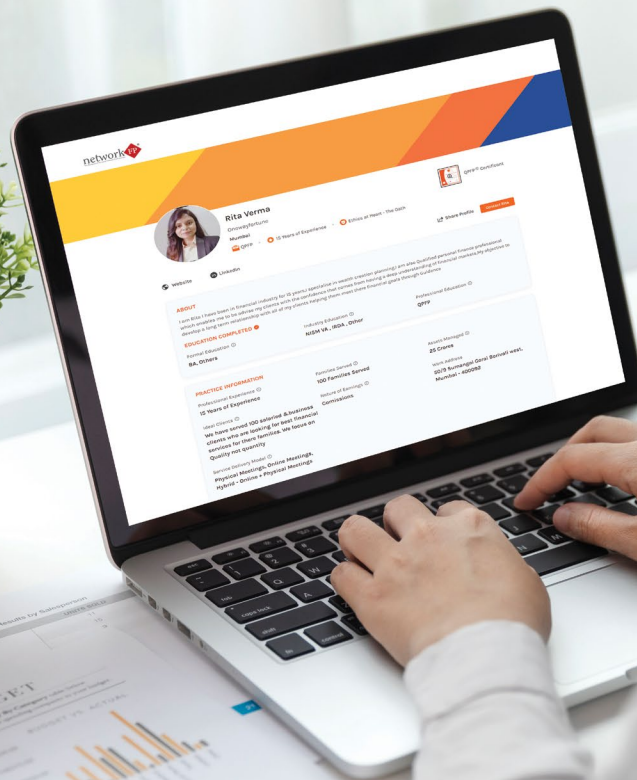
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NFP Profiles

NFP Profiles can be used by ProMembers to create and share their professional profile with clients & prospects. Can be used as a micro website or to generate leads.

Note: Only members meeting all 3 eligibility criteria can create their NFP Profile.





NFP Directory

NFP Directory is public listing of all eligible ProMember to help consumers & investors discover, know about and connect with ProMembers for help & services.

Note: Only members meeting all 3 eligibility criteria get listed on NFP Directory.

network FP

Find a Personal Finance Professional

Find professionals & experts who can help you & your family with financial wellbeing, investments, insurance, wealth management, financial goals & all personal finance products and solutions.

Search by member name or Enter city name

Experienced | **Ethical**

Gajendra Kothari
Elica Wealth Pvt Ltd
Mumbai
CFA, MBA - Finance | 10 Years of Experience | Ethical at Heart - The Goal

ABOUT
Hi, I'm Gajendra Kothari. One word, an avid long term investor, a tech lover, an entrepreneur, traveller & a passionate financial literacy campaigner.

EDUCATION COMPLETED

Formal Education BBM	Industry Education NISM VA	Professional Education CFA, MBA - Finance
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Khyati Mashru
Planrich Consultancy Llp
CWM
14 Years of Experience
[Know & Contact](#)

Jigish Patel
JP Financial
QFPF
23 Years of Experience
[Know & Contact](#)

Gajendra Kothari
Elica Wealth Pvt Ltd
CFA, MBA - Finance
10 Years of Experience
[Know & Contact](#)

Farhad Mogal
Family Finances
QFPF, MBA - Finance
14 Years of Experience
[Know & Contact](#)



NFP Events

NFP Events are industry level events to help professionals network with peers, gain latest insights, get inspired from best practices with NFP's vibrancy, values and energy.





NFP ProMembership Program

Membership Benefits



Eligibility Criteria

1. Completed Graduation in any stream +
2. Cleared any one industry examination (E.g. Any NISM exams or SEBI, IRDA, PFRDA, RBI exams) +
3. Optional* – Passed any Professional Certifications like QFPF, CFP, CWM, CFA, CA or PG in related field

** Members meeting 3rd Criteria also will be eligible to create NFP PROfile and get listed on NFP's Public Directory of ProMembers*

Immediate Access upon Registration

50+	30+	15+	1000+	100+
UpSkill Sessions	ProTool Files	IAP & Other Resources	Q&As on Exchange	ClientConnect Images



Join India's Largest Community of Personal Finance Professionals (PFPs)



Membership renewal will be due annually. Membership fees will be increased by around 10% annually.

Why ProMembers Love NFP Community

“

Mentor for Advisors & Distributors



An awesome platform and a true mentor for financial advisors and distributors. A professionally run organisation. Proud that I am a NFP ProMember since they started. Knowledge Sharing is awesome.

Manish Dodia, Mumbai

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“

Learn, Unlearn & Relearn



Network FP has helped me to grow continuously. Upskill sessions and ProTools are very helpful. It's platform that helps you to learn, unlearn and relearn. I feel proud to be a ProMember of Network FP.

Apeksha Kadam, Mumbai

”

“

Platform for Professionals



Network FP is providing a great platform for professionals like me, who are interested in improving skills by providing monthly masterclasses and weekly upskills. Also ProTools are very useful.

Dishit Parekh, Ahemdabad

”

“

Highest Quality Consistently



As a ProMember for over 5-6 years, I've consistently found NetworkFP's content and materials to be of the highest quality. Through ProMembership sessions, I've deepened my financial planning expertise and had the privilege of learning from top industry practitioners.

Anand Patel, Navsari

”

“

Roadmap for Growth



Thank you so much for initiating various activities for helping financial advisors add value in their day to day practice and also helping us create a roadmap to grow better. Once a ProMember, always a ProMember!

Manalee Verneker, Goa

”

“

Perfect for CFPs & Professionals



After completion of CFP, I was looking for a platform to get exposure to address practical issues and NFP proved to be a perfect one. NFP provides all necessary ProTools to provide solutions to clients' problems.

Prabhakar BV, Chennai

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network 
The Network of Personal Finance Professionals

PROMember®

Knowledge Driven Professionals

network 
The Network of Personal Finance Professionals

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