network FP®
The Network of Personal Finance Professionals

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PROMember®

Knowledge Driven Professionals

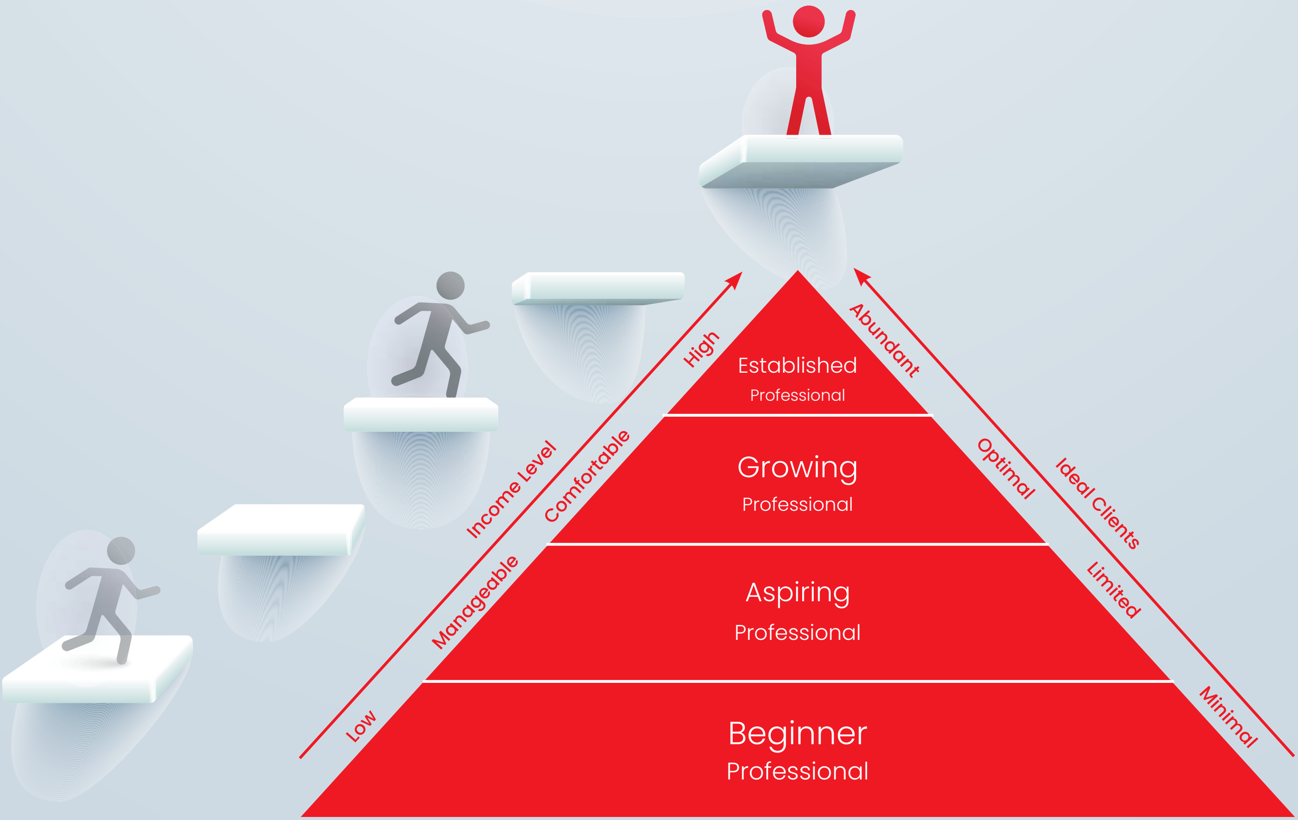
NFP ProMembership Program

Practical Continuous Education for
Personal Finance Professionals (PFPs)


GROW
PROMember®
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 & Portfolo 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

UpSkill Series

MF Categorization and Product Suitability

MF Categorization & Suitability series simplifies understanding and application of 40+ mutual fund categories covering their structure, risk profile, return potential, investor suitability and fund selection. This empowers PFPs to research, evaluate and recommend the right funds for clients.

Course Duration - 24 Hours

Course Trainers - CIOs & Fund Managers of top Mutual Fund houses.

Modules and Topics Covered

I. Equity Mutual Funds

1	Part 1 -	Large Cap, Mid Caps, Small Cap
2	Part 2 -	Large & Mid Cap, Multi Cap, Flexi Cap
3	Part 3 -	Focused Fund, Sectoral Funds, Thematic Fund
4	Part 4 -	Value Fund, Contra Fund, Dividend Yield

II. Hybrid Mutual Funds

5	Part 1 -	Arbitrage Funds, Conservative Hybrid, Equity Saving
6	Part 2 -	Dynamic AA, Multi AA, Balanced Hybrid, Aggressive Hybrid

III. Debt Mutual Funds

7	Part 1 -	Overnight, Liquid, Ultra Short, Low Dur, Money Market, Short Dur
8	Part 2 -	Medium Dur, Medium to Long, Target Maturity, Fixed Maturity
9	Part 3 -	Long Duration, Dynamic Bond, Gilt Fund with 10-Y, Gilt Fund
10	Part 4 -	Credit Risk, Banking and PSU, Corporate Bond Fund

IV. Other Mutual Funds

11	Passive MFs -	Equity Index, Debt Index, Gold & Silver ETFs, Other ETFs
12	Solution MFs -	Retirement Fund, Children’s Fund, ELSS Funds

MF Standardization & Best Practices

MF Categorization & Suitability series help MF advisors & distributors with best practices to recommend right products, deliver quality services, boost efficiency, scale with a team, and stay compliant with SEBI & AMFI guidelines.

Course Duration - 18 Hours   Founders & CXOs of leading Practice Management Softwares

Modules and Topics Covered

I. MF Client Onboarding

1 MF Client - Introductory Meeting
2 MF Client Profiling
3 MF Investors KYC & Compliance
4 MF Client Onboarding

II. MF Research & Analysis

5 Equity Funds Research & Whitelisting
6 Debt Funds Research & Whitelisting
7 Hybrid Funds Research & Whitelisting
8 MF Portfolio Building & Asset Allocation

III. MF Product Transactions

9 MF Product Suitablity & Incidental Advice
10 MF Transaction - Ecosytem
11 MF Transactions Management
12 MF Non Commerical Transactions

IV. MF Client Servicing

13 MF Portfolio Reporting
14 MF Client Portfolio Review
15 Important Client Communications

V. MF Practice Management

16 Client Meeting Best Practices
17 Practice & Business Growth Metrics
18 Reports & Records to Maintain

UpSkill Series

Alternate Financial Products

This UpSkill Series help you understand Alternative Financial Products like AIFs, PMS, Online Bonds, MLDs etc. to assess products, meet unique client needs, and grow your practice.

Course Duration - 24 Hours

Course Trainers - Founders & CXOs of Alternate Products

Modules and Topics Covered

I. PMS (Portfolio Managment Services)

1 PMS Product - Need & Evaluation
2 PMS Product - Suitability & Profiling
3 PMS Product - Industry & Structure
4 PMS Practice Management

II. AIF (Alternate investment Funds)

5. AIF Structure & Overview
6. AIF Categories - Cat 1, Cat 2, Cat 3
7. AIF Suitability & Evaluation
8. GIFT City

III. Online Bonds

9 OBPP Structure & Overview
10 Online Bonds Categories
11 OB Product Suitability
12 OB Practice Management

IV. Alt Debt & MLDs

13 AltDebt 1: Structure and Categories
14 AltDebt 2: Product Suitability & Practice
15 MLDs: Structure and Categories
16 MLDs: Product Suitability & Practice Management

V. P2P & LAS

17 P2P - Stucture
18 P2P - Changes in Regulations
19 LAS - Structure and Suitablity
20 LAS - Practice Management

MF Practice Checklists and Templates

Get, learn and implement ready-to-use checklists & templates for running a successful MF advisory and distribution practice. Also be compliant with SEBI regulations and AMFI guidelines.

Course Duration - 12 - 16 hours | Leading Practitioners of India | Scheduled in March 2025

Modules and Topics Covered

I. Client Management

1. Introductory Meeting Checklist
2. Client Profiling Checklist
3. Investors KYC Checklist
4. Client Onboarding Checklist
5. Client Meeting Checklist
6. Client Transactions Checklist

1. Investor Risk Profiler
2. KYC Tracker Template
3. Data Gathering Form
4. Client Satisfaction/ Feedback Form
5. Client Master Database
6. Product Recommendation Format

II. Research & Analysis

1. Equity Funds Research Checklist
2. Debt Funds Research Checklist
3. Hybrid Funds Research Checklist
4. MF Portfolio Review Checklist

1. Equity Whitelisting Tracker
2. Debt Whitelisting Tracker
3. Hybrid Whitelisting Tracker
4. Portfolio Review Reporting Template

III. Practice Management

1. Business Metrics Checklist
2. HR Best Practices Checklist
3. Softwares and Apps Checklist
4. Marketing Checklist

1. Business Metrics Tracker
2. Team Training Tracker
3. HR Policy Format
4. Technology and Apps Tracker

IV. Compliance & Regulations

1. AMFI Guideline & Code of Conduct
2. Regulatory Requirements Checklist
3. Records to Maintain Checklist

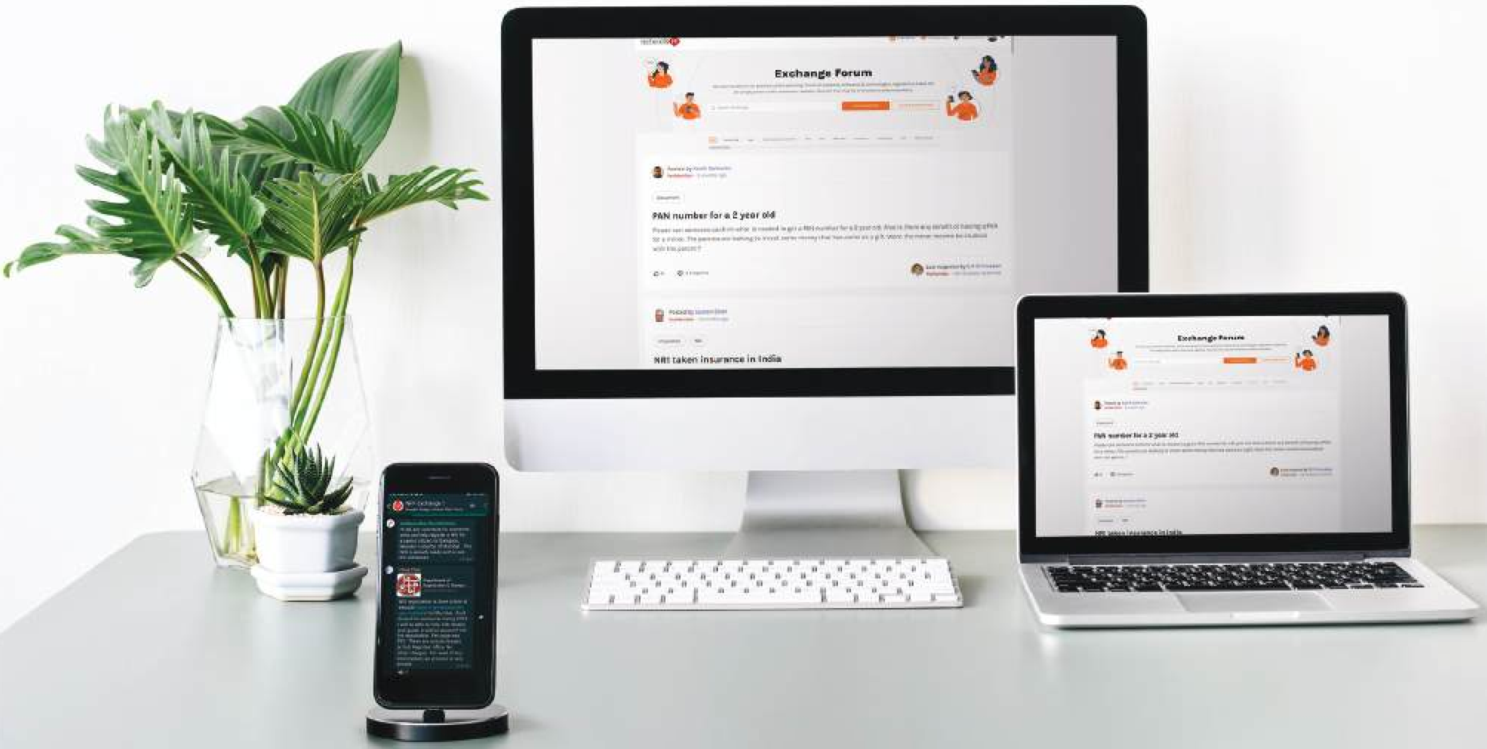
1. Checklist - MFD Application and Set-up
2. Compliance Monitoring and Tracker
3. Example AMFI DDQ Filled Questionnaire

NFP ProTools

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

NFP Exchange

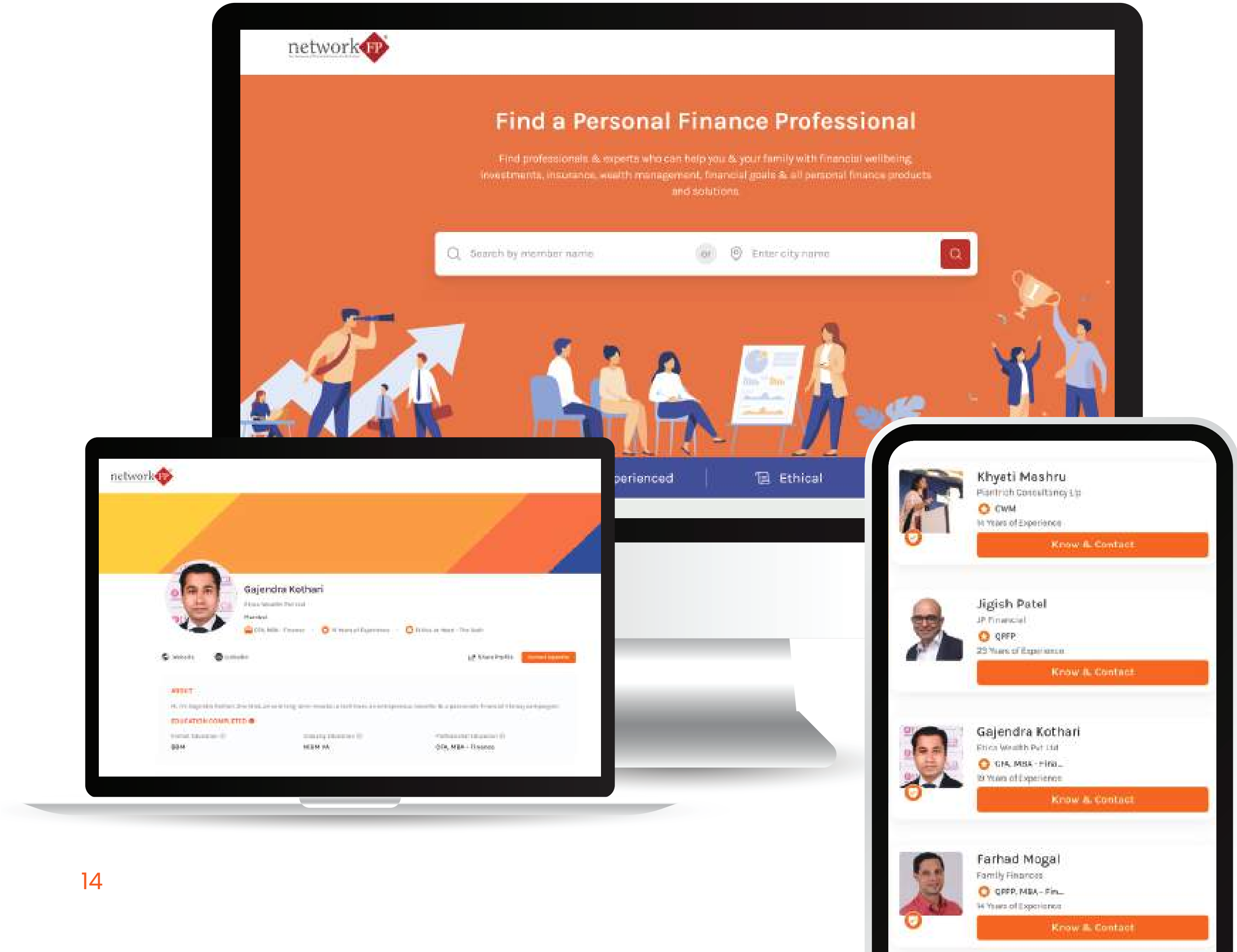
NFP Exchange is well moderated community Q&A forum on WhatsApp and Platform. Have a question? ASK. Help each other and get help from experts.



NFP 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.



NFP Resources

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

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.

NFP Quizzes

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

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.

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.


Regional Summits


EXIT


The reason for which the clients make the investments.
Step 2: Financial Solutions
Charmi Shah
Torrent Services
Saravanan S
Purplepond
Lakshmipathi Yelam
My Financial Pages
PROMember

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Membership Benefits

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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)

**Optional - Passed any Professional Certifications like QPFP, CFP, CWM, CFA, CA or PG in related field*

Members meeting optional Criteria will be eligible to get listed on NFP's Public Directory of ProMembers

Immediate Access upon Registration

10+	20+	20+	1000+	100+
UpSkill Courses	ProTool Files	IAP & Other Resources	Q&As on Exchange	ClientConnect Images

MEMBERSHIP FEES
₹16,000/-
+ GST PER ANNUM

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

Membership renewal will be due annually. Membership fees will be incraeased by around 10% p.a.

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

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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