

Next Batch
July 31st, 2021



Qualified
Personal
Finance
Professional[®]

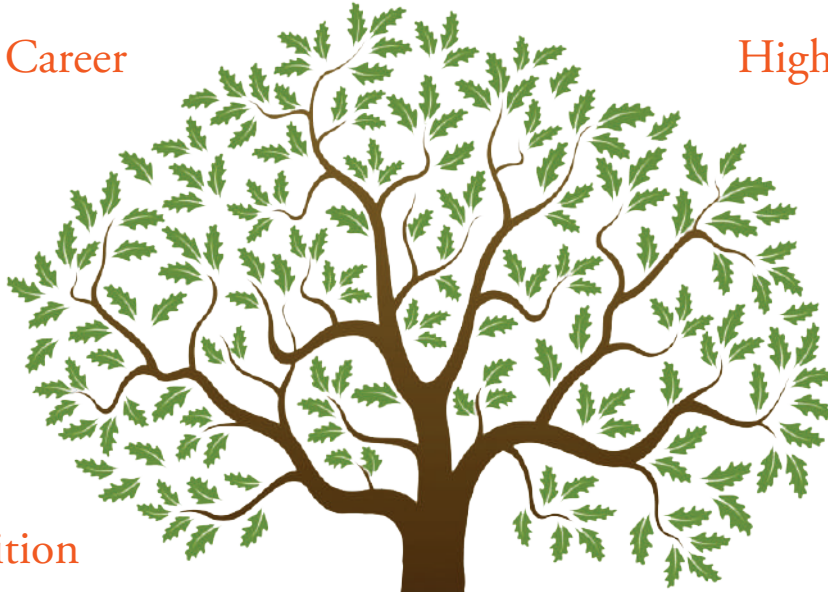
QFPF Certification Program

The Foundation of Your Professional Success

network [®]
The Network of Personal Finance Professionals

Lifetime Career

Higher Income



Recognition

More Clients

Competence
(Knowledge + Skills)

Character
(Integrity + Attitude)



Qualified
Personal
Finance
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The Foundation of Your Professional Success

QFPF Certification Program

Its your future, take charge

You want a *career for lifetime*, so that you are assured of a good & stable future.

You want *higher income*, so that you & your family can live a good life.

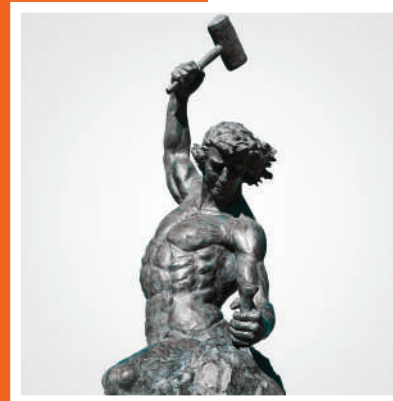
You want *more clients*, so that you can make a difference to people's lives.

You want *recognition*, so that you feel valued for your hard work & commitment.

Personal Finance Advisory is a great and noble profession which can help you achieve above four.

QFPF Certification Program helps career aspirants build a strong foundation by imparting the *required competence* (knowledge & skills) and the *right character* (integrity & attitude).

So that you can build and grow a successful career as a personal finance professional !



Why clients want to work with us

- We solve their problems & address their concerns
- We open up new opportunities for them
- We create, protect & manage their wealth
- They trust our competence (knowledge & skills)
- They trust our character (integrity & attitude)



QPFP Certification Program is designed to help you gain the right expertise and approach so that you can get, serve and retain clients for a lifetime.

Steps & Standards – QFPF® Certification Program

QFPF Certificants need to go through a rigorous program and meet high standards as follows:

1

Application - *Apply for QFPF Education Program*

Candidates who meet the following eligibility criteria may apply for QFPF Education Program;

- 1) Completed Graduation in any stream
- 2) Has cleared ANY ONE of industry exams like NISM VA (MF), VB, XA, XB etc or IRDA exams or has cleared any one module of CFP / CWM or CFA / CA or PG in related streams.

2

Education - *Complete the QFPF Education Program*

Candidate should attend the 100 Hour / 6 Month Education program comprising of 5 Modules with around 50 topics and 50 Protocols. Candidates can attend these weekly sessions live or via recordings spread across around 25 weeks.

3

Examination - *Clear Tests & Examinations*

Testing of QFPF Candidates happens at 3 levels as follows and QFPF Candidates should clear all the 3 levels for being eligible to apply for getting awarded with QFPF Certification;

- 1) Topic Tests – Attempt and Clear weekly topic tests conducted after each session
- 2) Module Exams – Attempt and Clear all module exams conducted after each module
- 3) Final Exams – Attempt and Pass the QFPF final exam conducted after program completion

4

Experience - *Meet Experience Criteria*

Candidate should complete at least One year of relevant experience in the area of personal finance. Experience gained before the start of the program or during the program is also considered valid. Experience of being employed or self-employed.

5

Ethics - *Sign Ethics@Heart Declaration*

QFPF Candidates need to sign the QFPF Ethics@Heart Declaration and agree to abide by ethical standards in their career, practice & business. ETHICS stands for Expertise, Transparency, Holistic, Integrity, Client-first, Solutions

6

Certification - *Get Awarded with QFPF® Certification*

QFPF Certification is awarded to candidates who successfully complete all the above 5 Steps along with required certification dues. On receiving the hard-earned certification, QFPF Certificants may;

- 1) Display QFPF Physical Certificate or Digital Certificate
- 3) Get listed on QFPF Directory for Public & participate in Public Awareness Programs
- 4) Use QFPF® Logo / Marks & Use Designation – Qualified Personal Finance Professional®



QFPF Education Delivery Model

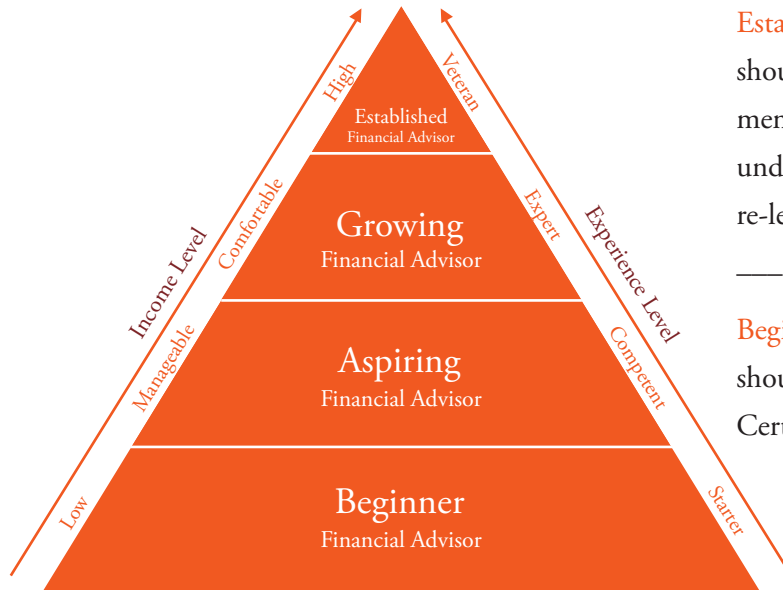


Live Sessions : Candidates can attend the weekly sessions live from the comfort of their home / office if the timings are convenient. Live sessions on Saturdays from 9.30 AM to 1.30 PM.



Recorded Sessions : Candidates for whom live timings are not suitable can watch the recorded sessions at their convenience anytime in students login portal. Recordings uploaded before end of day after live session.

Who should join QPFP Program



© Network FP

Established and Growing Financial Advisors should consider nominating existing team members or hire new & make them undergo the program or to unlearn & re-learn.

Beginner and Aspiring Financial Advisors should consider joining the QPFP Certification Program themselves.

Following Candidates will benefit from QPFP Program

1. Financial Advisors - IFAs, MFDs, CFPs & RIAs
2. Existing Team Members of Financial Advisors and Distributors
3. New Recruits (Hire for attitude, train for skills)
4. Children and Spouse of Financial Advisors wanting to join profession
5. Fresh Graduates aspiring to make a career in personal finance

QPFP

QFPF Program Trainers Panel

Network FP has hand picked some of the leading practitioners of India who are passionate about profession, have build a successful practice and are also good trainers. The trainers bring a practical approach to learning making it interesting and relevant.



Amit Trivedi



Anand Doctor



Archana Bhingarde



Arvind Rao



Bhuvana Shreeram



Gajendra Kothari



Gaurav Mashruwala



Harsh Roongta



Kalpesh Ashar



Khyati Mashru



Kiran Telang



Mukul Agarwal



Nitesh Buddhadev



Nikhil Kothari



Nisha Sanghavi



Prathiba Girish



Rohit Shah



Shalini Dhawan



Suresh Sadagopan



Viral Bhatt



Vivek Damani



Vivek Shah



Sunny Gala



Sadique Neelgund,
Program Director

QFPF Certification Program Curriculum

Module 1 - Core Foundations of Professional Success

Sr. No.	Session Topic Name	ProTool Name
1	Career Opportunities, Models & Strategies	Professional Capability Analyser
2	Roles, Responsibilities & Competency	Career Clarity & Vision Statement
3	Financial Maths & Time Value of Money (TVM)	One TVM Calculator
4	Financial Maths & Rate of Returns (ROR)	All in One Rates Calculator
5	TVM & ROR Case Studies	Personal Ethics Statement
6	Macro Economics Impacting Investors	My Business Numbers
7	Investor Behaviour, Emotions & Mistakes	Family FIDOK Organizer
8	Client Goals & Objectives	Client Goal Matrix
Module 1 Revision and Exams		



Module 2 - Designing Solutions for Client Needs

Sr. No.	Session Topic Name	ProTool Name
9	The Four Pillars of Personal Finance	Client REAL Statement
10	Behavioral Finance & Life Planning	One Page Financial Plan
11	Risk Management & Life Insurance Planning	Life Insurance Calculator
12	Health & General Insurance Planning	Emergency Fund Calculator
13	House Purchase	House Purchase Calculator
14	Children Education & Marriage	Children's Future Calculator
15	Retirement Consultancy	Retirement Planning
16	Investment Consultancy	Risk Profile Questionnaire
17	Tax Consultancy	Income Tax Calculator
18	Capital Gains Tax on Investments	Capital Gains Calculator
19	Wills & Succession Planning	Will Draft
20	Asset Class Understanding (E,D,R,G)	Asset Allocation & Assumptions
Module 2 Revision and Exams		

Module 3 - Financial Products Expertise & Suitability

Sr. No.	Session Topic Name	ProTool Name
21	Life Insurance Products	Insurance IRR Calculator
22	Health Insurance Products	Health Insurance Comparison Template
23	Other General Insurance Products	Traditional Plan Vs. MF + Term Plan
24	NPS, Govt Schemes & Emploment Benefits	Employee Benefits Calculator
25	Loans - Home, Education, Car, Mortgage	Loan Amortization Calculator
26	Evaluation of Investment Products - Equity	MF Whitelist Tracker
27	Evaluation of Investment Products - Debt	Yield & Duration Calculator
28	Equity Markets - Direct Equity	Stock Comparison Template
29	Equity Markets - PMS & Smallcase	PMS Comparison Template
30	Debt Markets - CDs, Bonds & Debentures	MF FactSheet Evaluation Tool
31	Mutual Funds - Categories	SIP Calculators - Part 1
32	Mutual Funds - Features	SWP Calculators - Part 2
Module 3 Revision and Exams		



Module 4 - Comprehensive Financial Consultancy Process

Sr. No.	Session Topic Name	ProTool Name
33	Establish Client-Consultant Relationship	Letter of Engagement
34	Understand Client's Situation & Goals	Data Gathering Form
35	Analyse & Develop Options for Clients	Asset - Goal Mapping
36	Recommend Strategies & Give Action Plan	Goal - Strategy Mapping
37	Execute Recommendations Efficiently	One Page Action Plan
14	Children Education & Marriage	Children's Future Calculator
38	Monitor and Annual Review Meetings	Annual Review Template

Module 5 - Client Management Global Best Practices

Sr. No.	Session Topic Name	ProTool Name
39	Client Coaching - Framework & Best Practices	Consultancy Process Matrix
40	Client Acquisition - Framework & Best Practices	Marketing Checklist for QFPs
41	Client Servicing - Framework & Best Practices	Client Satisfaction Survey Form
42	Client Engagement - Framework & Best Practices	Annual Engagement Matrix
43	Softwares & Technologies for Advisors/Distributors	List of Technologies for Consultants
44	Industry Regulations for Advisors / Distributors	Best Practices - Self Analysis Tool

Module 4 & 5 - Revision and Exams

QFP Examination & Convocation

45	QFP Mock Exam - 1
46	QFP Mock Exam - 2
47	QFP Final Examination
48	Workshop (Optional) - Comprehensive Financial Plan Construction using XLFP
49	QFP Marks Usage Guidance and Directory Listing
50	QFP Convocation Ceremony (Virtual)

QFP Coaches



Ajaay Beell



Balvir Chawla



Lakshmiathi Yelam



Puneet Oberoi



How You Can Use QPFP Marks



Qualified
Personal
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In the Physical World

1. QPFP Logo & Mark on Business Card
2. QPFP Logo & Mark on Marketing Materials
3. QPFP Certificate placement in office / workspace
4. QPFP Batch in public gatherings / meetings
5. QPFP Logo and Mark in all client communications



Qualified
Personal
Finance
Professional®

In the Digital World

1. QPFP Mark in LinkedIn / Twitter / Facebook
2. QPFP Mark in your website and profile
3. QPFP Certificate on Website and other online presence
4. QPFP Marks in your Email Signature
5. QPFP Certificants Directory listing

A Guide to QPFP Marks usage will be shared with qualifying candidates.

Next Batch (6th Batch)

1. Starts on July 31st, 2021 (6 months). Final Exam in February 2022
2. Live Timings – Saturdays 9.30 AM to 1.30 PM (4 Hours)
3. Recordings - uploaded in student login on same day
4. First Installment waived off for Members & Certificants – Self & Nominees

Program Fees – Pay as you progress

First Installment	Module 1	₹ 9,971
Second Installment	Module 2	₹ 9,971
Third Installment	Module 3	₹ 9,971
Fourth Installment	Module 4	₹ 9,971
Fifth Installment	Module 5	₹ 9,971
		₹ 39,884

* Fees mentioned above is inclusive of taxes (8,450 + 18% gst) for timely payments.

* Optional – QPFP Certification Fees of ₹ 8,450 is payable after passing finals.

* Optional – Candidates may attend additional focus workshops by paying separately.

* First attempt of all tests, exams are free. Nominal fees for re-attempts.

Program Fee Inclusions

- 1) 100 Hours of Training (Live / Recordings)
- 2) Login for recordings and downloads
- 3) Topic Tests & Module Exams
- 4) 50 + Templates / Calculators with training
- 5) Assignments to implement learnings
- 6) Query Solving & Handholding in Groups
- 7) Mock Exam and Final Exam Fees
- 8) Group Coaching for implementation



Testimonials from Previous Batches

Successfully completing QPFP Program gave me lots of insight about various aspects of the subject. Network FP has designed the program excellently. Will recommend to candidates in Non-Metros also to undergo QPFP even if you have done CFP.

Amit Kumar Maheshwari, Indore

Network FP's maiden venture into certification for industry professionals is highly recommended based on its content, structure and efficient organisation. I will strongly recommend this program to all individuals who have more than one year experience.

Aniruddha Sengupta, Mumbai

This program is a wholesome approach to training a person in every aspect required to become a qualified professional in the field of Finance. Any fresher coming into the field or any person who has lost touch and need a refresher, this is the place to be.

Anupriyaa Bhat, Chennai

I had enrolled my staff for QPFP. Though she is undergoing her CFP, I found her to be more confident after the course. Also her analytical and soft skills improved post the course. Would definitely recommend IFAs to consider for self or their staff.

Balvir Chawla, Pune

Each aspect of financial advisory is covered from product knowledge to delivery of advise. We took years to learn the game on our own, newbies can definitely learn quickly by wisdom delivered by experienced financial advisors.

Kshitija Shete, Bangalore

One of the best inputs from industry experts which guides you to actually implement financial planning practice to its optimum. Shapes an individual as a professional. Great Inputs, Great Course & Great Content !

Monish Shah, Mumbai

It was really very much nicely conducted course. It is quite helpful for even a new person in this field. Also it gives immense value additions to your knowledge and refreshes it. Thanks to every trainer for their guidance.

Pramod Kulkarni, Pune

The course is one of its kind, comprehensively designed. I would highly recommend this to anyone who is interested in making career in Personal Finance space. For me it was good refresher course.

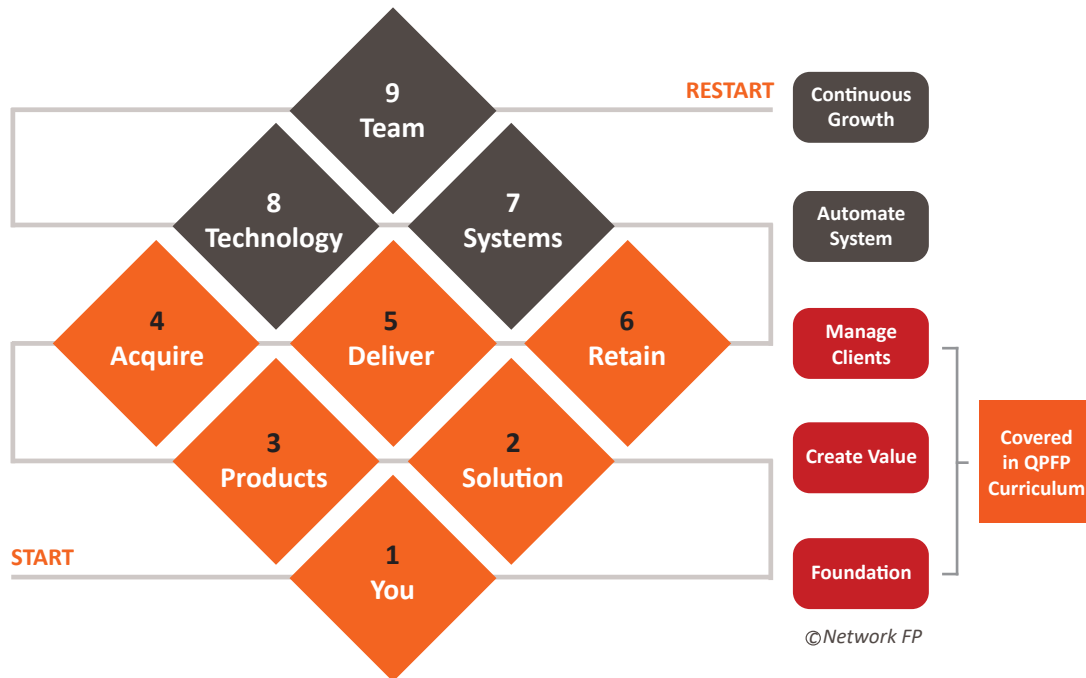
Rashi Bhargava, Delhi

The Nine Step SFA Blueprint

The Making of a Successful Financial Advisor (SFA)

QFPF Program Curriculum and Structure has been build to help candidates acquire the knowledge and skills required to serve clients holistically and offer comprehensive advisory services.

QFPF Program covers the first 6 Steps of **Network FP's - The Nine Step SFA Blueprint** which shows a step by step roadmap to becoming a successful financial advisor (SFA). The image below highlights the 6 Steps covered in the QFPF Certification Program.





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Professional®



Network FP Knowledge Solutions Pvt. Ltd.

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