

Next Batch  
Feb. 18<sup>th</sup>, 2023

30%Discount

- PROMembers
- Nominees
- Referrals



Qualified  
Personal  
Finance  
Professional<sup>®</sup>

## QFPF Certification Program

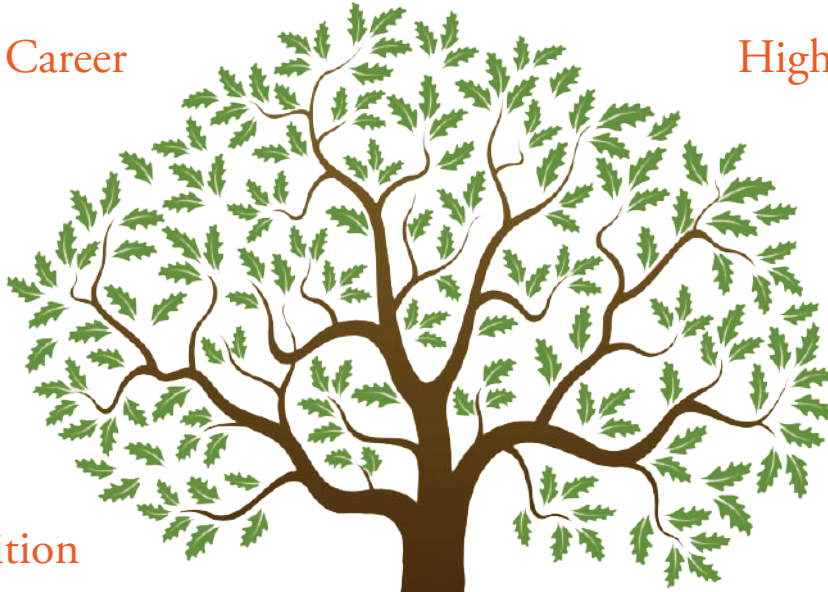
The Foundation of Your Professional Success

network <sup>®</sup>  
The Network of Personal Finance Professionals



Lifetime Career

Higher Income



Recognition

More Clients

Competence  
*(Knowledge + Skills)*

Character  
*(Integrity + Attitude)*



The Foundation of Your Professional Success

*QFPF Certification Program*

# It's 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 Profession 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 !



QFPF

## Why clients want to work with QFPs

- QFP solves client's problems & address their concerns
- QFP opens up new opportunities for clients
- QFP creates, protects & manage clients wealth
- Clients trust QFP's competence (knowledge & skills)
- Clients trust QFPs character (integrity & attitude)



QFP 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 – QPFP® Certification Program

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

## 1 Application - *Apply for QPFP Education Program*

Candidates who meet the following eligibility criteria may apply for QPFP 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 QPFP Education Program*

Candidate should attend the 100 Hour / 6 Month Education program comprising of 4 Modules with around 50 topics and 50 Protocols. Candidates can attend these weekly sessions live or via recordings.

## 3 Examination - *Clear Tests & Examinations*

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

- 1) Topic Tests – Clear weekly topic tests conducted after each session (60% of topic test)
- 2) Module Exams – Clear all module exams conducted after each module (All module exams)
- 3) Final Exams – Clear the QPFP final exam conducted after program completion (live only exams)

## 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*

QPFP Candidates need to sign the QPFP 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 QPFP® Certification*

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

- 1) Display QPFP Physical Certificate or Digital Certificate
  - 2) Get listed on NFP Directory for Public & participate in Public Awareness Programs
  - 3) Use QPFP® Logo / Marks & Use Designation – Qualified Personal Finance Professional®
  - 4) All certificants will get access to the recordings post-completion of the program.
- QPFP Certificants will have to fulfil the Annual Continuous Education (ACE) points and Renewal requirements to maintain their certification. (12 points a year)

The logo for QPFP (Qualified Personal Finance Professional) features the letters 'QPFP' in a white serif font, positioned below a white outline of a house or roof shape. The logo is set against a solid orange square background.

# QFPF Education Delivery Model

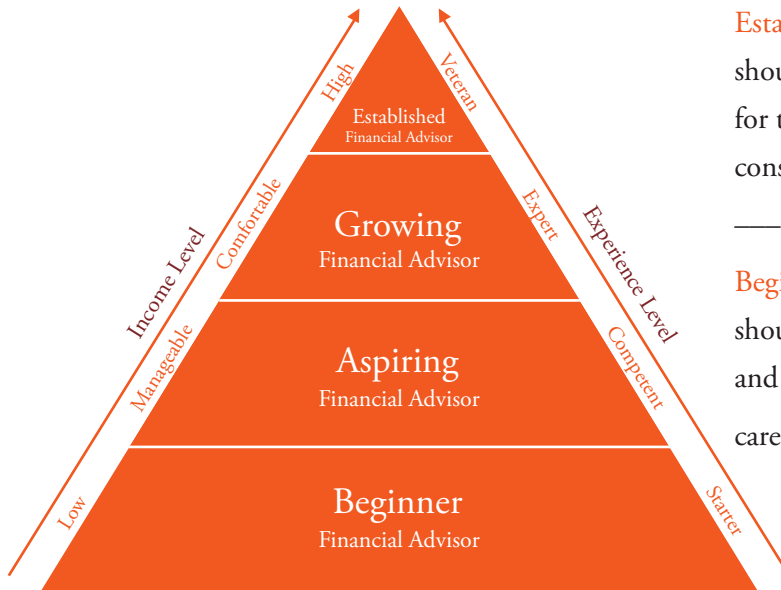


**Live Sessions :** Candidates can attend the weekly sessions live from the comfort of their home / office if the timings are convenient. Live sessions on Saturdays from 9.15 AM to 1.45 PM.



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

# Who should join QPFP Program ?



© Network FP

**Established and Growing Financial Advisors** should join to rebuild their career / practice for the new world in a new way. May also consider nominating their team members.

**Beginner and Aspiring Financial Advisors** should join to get super clarity, exact tools and required knowledge to build a thriving career / practice.

## Following Candidates will benefit from QPFP Program

1. Existing 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. Second Career Aspirants and Career changers

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



Arijit Sen



Arvind Rao



Babu Krishnamoorthy



Balvir Chawla



Bhuvana Shreeram



Chetan Chandaliya



Deepesh Mehta



Dilshad Billimoria



Gajendra Kothari



Harsh Roongta



Hitesh Soni



Kalpesh Ashar



Kavitha Menon



Khyati Mashru



Kiran Telang



Lakshmpati Yelam



Mohini Mahadevia



Meghashyam Sincar



Mukesh Jindal



Mukul Agarwal



Nikhil Kothari



Nisha Sanghavi



Nitesh Buddhadev

# QFPF Program Trainers Panel



Puneet Agarwal



Prathiba Girish



Pankaj Gera



Puneet Oberoi



Ramesh Bhat



Rohit Shah



Sanjeev Govila



Shailendar Kumar



Shalini Dhawan



Suresh Sadagopan



Suresh A



Viral Bhatt



Vivek Shah



Vishal Dhawan



Dipin Chachlani  
*Program Manager*



Sadique Neelgund,  
*Program Director*

# QFPF Coaches



Ajaay Beell



Balvir Chawla



Lakshmiopathi Yelam



Nikhil Karnik



Rajeshwar Reddy



Sandeep Sahni

# QPFP Certification Program Curriculum

## Module 1 - Foundation Course For Personal Finance Professionals

Sr. No.	Session Topic Name	ProTool Name
1	Financial Consultancy Practice and Opportunities	My Practice Model Builder
2	My Ideal Practice Model and Career Blueprint	Practice Indicators & Business Plan
3	Ethics, Responsibilities & Client First Approach	Ethics @ Heart - Self Analysis Tool
4	Financial Maths & Time Value of Money - 1	One TVM Calculator
5	Financial Maths & Rate of Return - 2	One ROR Calculator
6	Macro Economics Impacting Investors	VM & ROR - Practice Questions
7	Indian Investor Preferences, Trends & Mistakes	Risk Profile Questionnaire
8	Pillars of Personal Finance & Behavioral Finance	Real Statement
9	Financial Goals Pyramid - Client Needs & Wants	Clients Goal Matrix
<b>Module 1 Revision and Exams</b>		

## Module 2 - Designing Financial Solutions for Client Needs

Sr. No.	Session Topic Name	ProTool Name
1	Organizing Financial Life & Debt Management	Family FIDOK & Ratios
2	Health & General Insurance Solutions	Emergency Fund Calculator
3	Life Insurance Solutions	Life Insurance Calculator
4	Investment Solutions without any specific goals	Financial Freedom Calculator
5	Children Education & Marriage Consultancy	Children's Future Calculator
6	House Purchase Consultancy	House Purchase Calculator
7	Retirement Accumulation Consultancy	Retirement Accumulation Calculator
8	Retirement Distribution Consultancy	Retirement Distribution Calculator
9	Income Tax Consultancy	Income Tax Calculator
10	Wills & Succession Consultancy	Will Template
11	NRI Investments & Consultancy	One Page Financial Plan
12	Asset Classes and Asset Allocation Models	Asset Allocation & Assumptions
<b>Module 2 Revision and Exams</b>		

## Module 3 - Evaluating Suitability of Personal Finance Products

Sr. No.	Session Topic Name	ProTool Name
1	Health Insurance Products	Health Insurance Comparison Template
2	Other General Insurance Products	Complete Insurance Portfolio Builder
3	Life Insurance Products	Life Insurance Comparison Template
4	Home Loans & Other Liabilities	Loan Amortization Calculator
5	Employment Benefits & Government Schemes	Employee Benefits Calculator
6	Real Estate & Gold Investments	House Rent vs. Buy Calculator
7	Evaluation of Investment Products	MF Investment Performance Calculators
8	Equity Markets and Direct Equity	Mutual Fund Whitelist Tracker - Equity
9	Debt Markets and Direct Debt	MF Whitelist Tracker - Debt & Hybrid
10	Mutual Funds - Part 1	SIP Calculators
11	Mutual Funds - Part 2	SWP Calculators
12	PMS and AIF	FD as Debt MF
13	International Investing	NA (Product Matrix)
14	Other Investment Products - P2P, Passive etc	NA ( Financial Ratios)
15	Capital Gains Tax on Investments	Capital Gains Calculator
<b>Module 3 Revision And Exams</b>		



## Module 4 - Financial Consultancy Processes for Client Success

Sr. No.	Session Topic Name	ProTool Name
1	Comprehensive Financial Consultancy Process	Consultancy Process Matrix
2	Investment Consultancy Process	Letter of Engagement
3	Insurance Consultancy Process	Data Gathering Form
4	Retirement Consultancy Process	Asset-Goal Mapping & Funding
5	Tax Consultancy Process	Product-Goal Action Plan/One Page Plan
6	Succession Consultancy Process	Annual Review Template
7	Client Management Processes - Best Practices	Annual Client Satisfaction Survey
8	PFPs Solutions & Technologies	My Techstack Builder
9	Industry Regulations and Compliance	Global Best Practices Checklist
<b>Module 4 Revision And Exams</b>		

# How Can You Use QPFP Marks?



Qualified  
Personal  
Finance  
Professional®

## 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



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## 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 (8th Batch)

1. Starts on February 18th, 2023. Final Exam in September 2023
2. Live Timings – Saturdays 9.15 AM to 1.45 PM (4.5 Hours)
3. Recordings for Self Study- uploaded in student login on Saturday itself by end of day.

## Program Fees – Pay as you progress

		Course Fee	Discounted Fee*
First Installment	Application and Module 1 Fees	₹ 12,000	₹ 8,450
Second Installment	Module 2 Fees (After M1 Exam)	₹ 12,000	₹ 8,450
Third Installment	Module 3 Fees (After M2 Exam)	₹ 12,000	₹ 8,450
Fourth Installment	Module 4 Fees (After M3 Exam)	₹ 12,000	₹ 8,450
<b>Total Program Fees</b>		<b>₹ 48,000</b>	<b>₹ 33,800</b>

Optional - QPFP Certification Fees after Final Exam (Valid for 3 years)		₹ 12,000	₹ 8,450
Optional - PROMembership Fees (First year discounted fee)		₹ 13,000	₹ 8,450

\* 30% Discount for NFP PROMembers and their nominees and referrals

\* GST 18% is applicable on the above fees mentioned.

\* First attempt of all topic tests, module exams & final exam are free. Nominal fees for re-attempts & extensions.

## Program Fee Inclusions

- 1) Training – 100 Hours of Training (Live / Recordings)
- 2) ProTools – 50+ Tools / Templates / Calculators
- 3) Courseware – Digital Handouts / PPT Slides
- 4) Tests & Exams – 45 Topic Tests , 4 Module Exams & 2 Mock Exams
- 5) Final Exam – Supervised Final Exams (Live Only)
- 6) Group Coaching – Query Solving, Handholding, Guidance & Implementation call
- 7) One-One Coaching with Coaches & Peer to peer Learning





## 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.

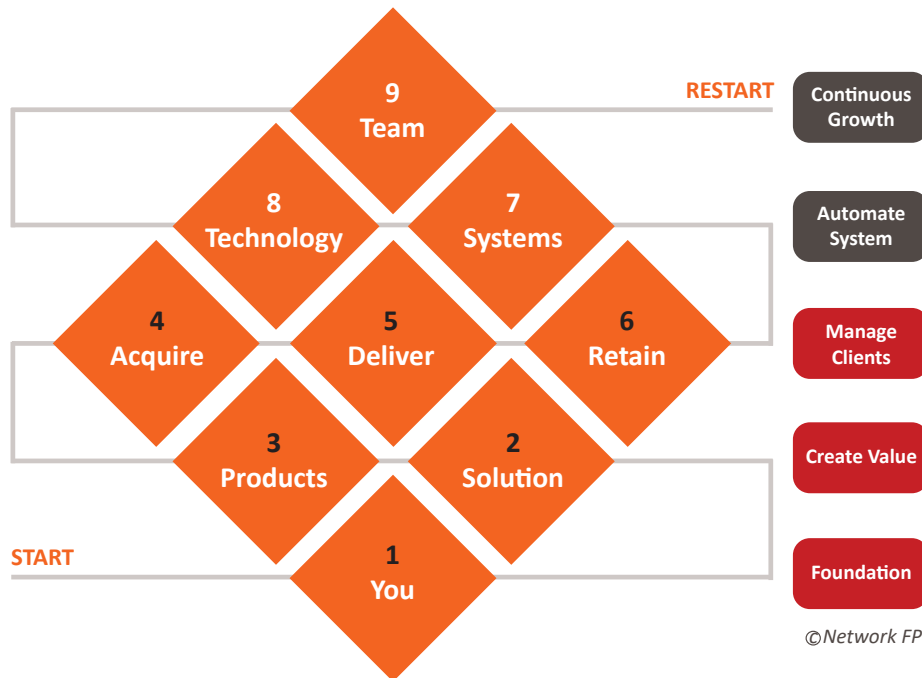
*Rashi Bhargava, Delhi*

# The Nine Step SFA Blueprint

## The Making of a Successful Financial Advisor (SFA)

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

QFPF Program covers the Steps of **Network FP's - The Nine Step SFA Blueprint** which shows a step by step roadmap to becoming a successful financial advisor (SFA).





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