



Qualified
Personal
Finance
Professional[®]

QFPF Certification Program

Prepares You to
Do Good for Clients and Earn Well for Self

Build Competency Build Credibility



Ideal Clients

Higher Income



Professional Recognition

Lifetime Career

Higher Competency

Stronger Credibility



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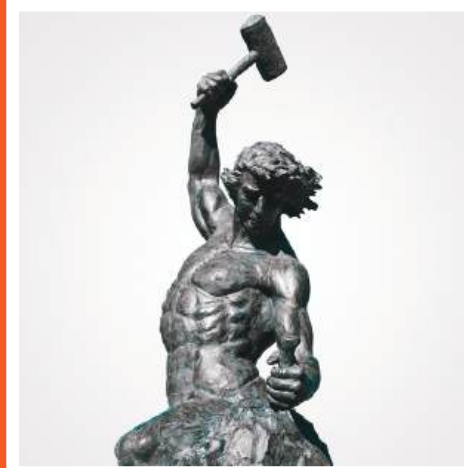
The Foundation of Your Professional Success

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 professional 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.

QPFP Certification Program helps you build a strong foundation with higher competency and stronger credibility.





How QFPF helps Clients

QFPF program is designed to serve the interests of clients. Below are some ways in which Clients benefit by working with QFPF Certificants;

- ✓ Solve money problems & concerns
- ✓ Create, protect and manage wealth
- ✓ Achieve financial wellbeing & freedom
- ✓ Meet family's financial goals & dreams
- ✓ Gets a trustworthy well-wisher for family

How QFPF helps Professionals

QFPF program helps professionals be it 'employed' or 'self-employed'. Below are some ways in which QFPF Certification helps professionals;

- ✓ Adopt Client First approach
- ✓ Attract & acquire Ideal Clients
- ✓ Get 100% wallet-share from clients
- ✓ Serve & retain clients for life
- ✓ Streamline processes for scaling

QFPF Program Structure / Highlights

A 6-month online program designed for financial advisors and distributors to learn from seasoned experts who've been there, done that and earn the coveted title - Qualified Personal Finance Professional (QFPF). Below are some highlights of program.



100+

Training Hours



50+

Tools & Resources



30+

Practitioner Trainers



1-to-1

Coaching Call



1,000+

Practical Questions

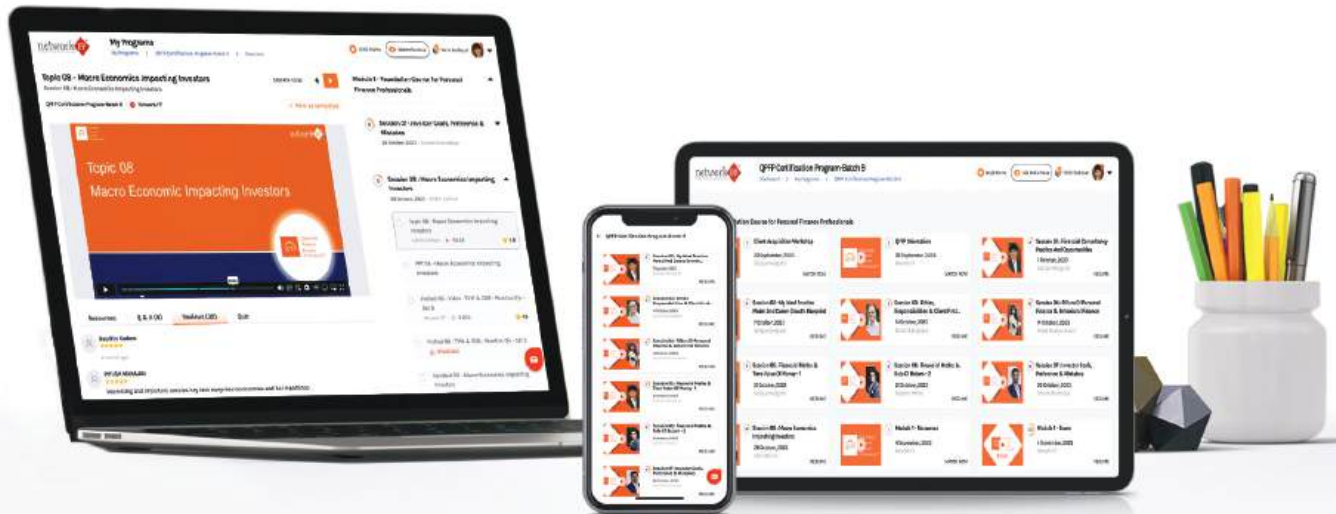


200+

Learners Batch

QFPF Education Delivery Model

QFPF Certification Program is delivered 100% online wherein sessions and exams can be attended virtually by candidates from the comfort of their home / office.



LIVE

Live Sessions :

Candidates can attend the weekly sessions live from the comfort of their home / office if the timings are convenient. Live sessions are held on pre decided date and are interactive in nature.

REC

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.

QFPF Program Trainers and Coaches

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



Ajaay Beel



Balvir Chawla



Bhuvanaa Shreeram



Chetan Chandaiya



Charmi Shah



Deepesh Mehta



Dilshad Billimoria



Gajendra Kothari



Harsh Roongta



Hitesh Soni



Kalpesh Ashar



Kavitha Menon



Khyati Mashru



Kiran Telang



Lakshmipathi Yelam



Meghashyam Sinkar

Learn from the Masters

QFPF Trainers and coaches are successful practitioners serving hundreds of clients and managing anywhere from ₹100 to ₹1,000 crores of assets. The trainers bring a practical approach to learning making it interesting and relevant.



Mukul Agarwal



Nikhil Karnik



Nikhil Kothari



Nisha Sanghavi



Nitesh Buddhadev



Prathiba Girish



Puneet Agarwal



Puneet Oberoi



Rajeshwar Reddy



Saurabh Mittal



Shailendra Kumar



Shalini Dhawan



Suresh A



Suresh Sadagopan



Sandeep Sahni



Srikanth Matrubaai



Vishal Dhawan



Viral Bhatt



Dipin Chachlani



Sadique Neelgund

Note: The trainers & coaches mentioned above are from past batches. The next batch of trainers & coaches maybe same or different.

QFP Curriculum



QFP Topics

LEVEL - I

Foundations for Personal Finance Professionals

1. PFP Profession - Clarity & Opportunities
2. PFP Career Growth Blueprint
3. Ethics, Responsibilities & Client First Approach
4. Pillars Personal Finance & Behavioral Finance
5. Investor Goals & Common Mistakes
6. Capital Markets & Impact on Investors
7. Financial Maths & Time Value of Money - 1
8. Financial Maths & Rate of Return - 2
9. Comprehensive Financial Consultancy Process
10. Macro Economics Impacting Investors
11. Asset Classes & Investment Products
12. Industry Regulations and Compliance



QFP Protocols

1. PFP Capability Analyzer
2. PFP Credibility Analyzer
3. Ethics @ Heart - Tool
4. REAL Statement
5. Clients Goal Matrix
6. Asset Class Performance
7. One TVM Calculator
8. One ROR Calculator
9. Consultancy Process Matrix
10. Client Financial Indicators
11. Product Suitability Matrix
12. Best Practices Checklist

QFP Curriculum



QFP Topics

LEVEL - II

Personal Finance Solutions & Client Goals

1. Organizing Financial Life & Debt Management
2. Wealth Management & Investment Solutions
3. Health & General Insurance Solutions
4. Life Insurance Solutions
5. Children's Education & Marriage
6. House Purchase Consultancy
7. Retirement Accumulation Consultancy
8. Retirement Distribution Consultancy
9. Wills & Succession Consultancy
10. Income Tax Planning
11. NRI Investments & Consultancy
12. Asset Allocation Models & Consultancy



QFP PROTOOLS

1. Family FIDOK Organizer
2. Risk Profiling Tool
3. General Insurance Calculators
4. Life Insurance Calculator
5. Children's Future Calculator
6. House Purchase Calculator
7. Retirement Accumulation Calculator
8. Retirement Distribution Calculator
9. Will Template
10. Income Tax Calculator - Old & New
11. One Page Financial Report
12. Asset Allocation & Assumptions



LEVEL - III

Personal Finance Products & Suitability Analysis

QFP Topics

1. Life Insurance Products
2. Health & General Insurance Products
3. Employment Benefits & Government Schemes
4. Real Estate & Gold
5. Mutual Funds - Categories, Features & Benefits
6. Mutual Funds - Plans, Taxation & Costs
7. PMS & AIF
8. Other Products - P2P, Passives, International, Etc
9. Evaluation of Equity Oriented Products
10. Home Loans & Other Liabilities
11. Evaluation of Debt Oriented Products
12. Capital Gains Tax on Investments

QFP Protocols

1. Life Insurance Recommendation Template
2. Health Insurance Recommendation Template
3. Employment Benefits Calculator - EPF, NPS, Gratuity
4. House Rent vs. Purchase Calculator
5. SIP Calculators
6. SWP Calculators
7. SIP to foreclose home loan
8. Onboarding Letter
9. Equity MF Whitelist Tracker
10. Loan Amortization Calculator
11. Debt Whitelist Tracker
12. Capital Gains Calculator

Optional – Personal Finance Blueprint

Workshop on ‘Comprehensive Financial Blueprint Construction’
using Excel-based Financial Planning Templates (XLFP)



XLFP Coverage

1. Comprehensive Planning / Blueprint
2. Data Gathering Process
3. Current Financials Process
4. Future Goals Process
5. Cashflow Preparation Process
6. Executive Summary Preparation
7. Formatting & Customisation
8. Basic Planning / Blueprint



XLFP Templates

1. Master XLFP Tool & Templates
2. Data Gathering Templates
3. Current Financials Templates
4. Future Goals Templates
5. Cashflow Preparation Templates
6. Executive Summary Templates
7. Excel Functions & Shortcuts for PFPs
8. Financial Plan / Blueprint Process Chart

Ready to use Tools & Templates

ProTools are templates, formats and calculators that can be used in practice and with clients soon after learning in QFPF program.

Client Goals Matrix

	Short-Term Goals	Medium-Term Goals	Long Term Goals
	Less than 2 Years	3-7 Years	More than 7 Years
Needs High Priority	Emergency Funding House Purchase	Parents Medical F Car Purchase	
Wants Medium Priority	Self-Higher Education	Vacations Abroad	
Dreams Low Priority	Learn a Hobby Charity / Social Work	Long Term Sabbat Holiday Home	

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Personal Financial Report of
Mr. Philip Naronha & Family

Current Financial Situation of Family

1	Your Current Assets	₹	32,00,000	5	Your Annual Income	₹	21,00,000
2	Your Current Liabilities	₹	5,00,000	6	Your Annual Expenses	₹	10,70,000
3	Your Current Network	₹	27,00,000	7	Your Annual Surplus	₹	10,30,000
4	Emergency Funds Required	₹	3,56,667	8	Your Monthly Surplus	₹	85,833

Investment Recommendations for Meeting Goals

Sr. No.	Financial Goals of Family	Present Value of Amount	Years for Goal	Future Value of Amount
1	Retirement Planning	NA	28	₹ 9,32,05,2
2	House Downpayment	NA	5	₹ 36,50,0
3	Child's Graduation	₹ 20,00,000	14	₹ 53,57,0
4	Child's Marriage	₹ 20,00,000	16	₹ 59,04,3
5	Vacations	₹ 1,00,000	3	₹ 1,22,5

Total Monthly Investments Suggested

Retirement Accumulation Calculator

Client Goal

How would like to accumulate an investment corpus to fund your retirement blng expenses from the age 60 to 65.

Sr. No	Particulars	Amount
Your Current Expenses		
1	Household Expenses (Annual)	360,000
2	Utilities Expenses (Annual)	360,000
3	Any Other Expenses	0
	Total Current Annual Expenses	720,000
	Total Current Monthly Expenses	60,000
Your Future Annual Expenses		
1	Current Age	35
2	Retirement Age	60
3	No. of Years for Retirement	25
4	Inflation	6.0%
5	Drop in Expenses after Retirement	20.0%
	Annual Expenses @ Retirement Age	1,05,500
	Monthly Expenses @ Retirement Age	8,792
	Investment Corpus Required	
1	Life expectancy Age	85
2	No. of Years Post-Retirement	25
3	Inflation during Post-Retirement Years	5.0%
4	Net Tax on Investment Income	15.0%
5	Investment Returns on Retirement Corpus	10.0%
6	Tax Adjusted Return	8.50%
7	Real Return (Inflation & Tax Adjusted)	3.18%
	Retirement Corpus Required	1,08,89,882

50+
ProTools

Peer-to-Peer Learning

QFPF Candidates not only get to learn from trainers and coaches, but also from fellow batch-mates. The program through various channels facilitates knowledge sharing and bond building with like-minded professionals from across India.



One-to-One Coaching

QFPF Candidates go through a structured 1-to-1 coaching call with experienced coaches along with group coaching calls after each levels to get addressed all program and practice related queries.



QFPF Details, Eligibility & Fees

1. Live Timings – Saturdays 9.30 AM to 2.00 PM (4.5 Hours).
2. Recordings for Self Study – uploaded on Saturday itself.
3. For next batch dates and discount offers, contact NFP team.

Program Fees – Pay as you progress

First Installment	Level 1 Program Fees	₹ 16,000
Second Installment	Level 2 Program Fees	₹ 16,000
Third Installment	Level 3 Program Fees	₹ 16,000
Total Program Fees		₹ 48,000
QFPF Certification Fees (after passing final exam)		₹ 16,000

* Optional- XLFP Workshop (Personal Finance Blueprint) & NFP ProMembership

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

* First attempt of all level exams & final exam are free. Nominal fees for re-attempts & extensions.

* 50% Discount for NFP ProMembers on Level I Fees

Program Fee Inclusions

- 1 **Training** – 100+ Hours of Training (Live / Recordings)
- 2 **ProTools** – 50+ Tools / Templates / Calculators
- 3 **Courseware** – Digital Handouts / PPT Slides
- 4 **Examinations** – Level Exams, Mocks & Final Exam
- 5 **Tests & Exams** – 3 Level Exams & 1 Final Exam
- 6 **Coaching** – 1-to-1 and Group Coaching with Coaches
- 7 **Peer-to-Peer** – Query solving and Knowledge sharing

QFPF 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 or CFP / CWM / CFA / CA exams or PG.

QFPF Journey – From Start to Finish Line

Step 1

QFPF Application

Meet the QFPF Eligibility Criteria and apply for upcoming QFPF batch.

Step 2

QFPF Level I

Attend Level I sessions and attempt topic tests & clear 2 hour / 120 marks exam.

Step 3

QFPF Level II

Attend Level II sessions and attempt topic tests & clear 2 hour / 120 marks exam.

Step 4

QFPF Level III

Attend Level II sessions and attempt topic tests & clear 2 hour / 120 marks exam.

Step 5

QFPF Final Exam

Prepare with 2 Mock Exams and clear 4 hr / 240 marks proctored live final exam.

Step 6

QFPF Certification

Apply to get QFPF Certification to use QFPF® marks, logo and designation.

Optional

XLFP Workshop (Personal Finance Blueprint)

After Level III, opt to attend XLFP Workshop & Templates (live / recorded).

Optional

After Step 6 – ProMembership

Apply for NFP ProMembership for continuous education & professional networking



Why QFPPIans the Program

“

Successful practitioners as trainers



The key highlight of the program is the Curriculum which is diligently designed to offer excellent practical insights into the real-world related challenges. Another would be experienced and the esteemed trainers of the program.

Roshni Nayak, QFPPI®, Mumbai”

“

Doubled my practice in just 2 years



QFPPI Program is a gateway to success for PFPs. Personally, QFPPI has helped me to not only to two-fold my business in just 2 years but also helped me to improve my relationships with my existing & new clients.

Narayan Ambulgekar, QFPPI®, Bengaluru”

“

Professional client presentations



Obtaining the QFPPI Certification has been a transformative experience for me as a personal finance professional. The utilization of Protools has significantly enhanced my ability to deliver compelling and professional presentations to clients.

Makesh Sivasankar, QFPPI®, Bengaluru”

“

Client First model of business



The QFPPI course enabled me to acquire ProTools for my practice. The deep learning from coaches, trainers, and peers provided a robust learning foundation which has given me a perfect base for the Client First model of business.

Uday Rao, QFPPI®, Vadodara”

“

Most practical and engaging course



QFPPI is the most knowledgeable, practical and engaging course for PFPs. It has equipped me with skills to manage my clients better and enhance their experience and grateful to Network FP for this initiative.

Varsha Murdeshwar, QFPPI®, Mumbai”

“

Boosted my confidence in profession



The QFPPI training proved to be highly advantageous. The well-organized curriculum and knowledgeable professors facilitated the comprehension of intricate subjects. On the whole, it greatly improved my skills and boosted my confidence in the profession.

Chintan Kamdar, QFPPI®, Rajkot”



Qualified
Personal
Finance
Professional®

“

Practical templates for all client goals



I was a NFP Pro-member and I was impressed by what I heard about QFPF certification. And I must say that QFPF did not disappoint me. It helped me in the following ways: 1) Soft skills to grow my business ; 2) Ready to use practical, excel based templates for all client goals. ; 3) ETHICS at heart, it taught me right values and attitude

Seema Ahuja, QFPF®, Mumbai”

“

It's been transformational for both of us



NetworkFPF's QFPF course is commendable for all the PFPs. Both personally and professionally transformative for me and my daughter. With the incredible benefits we've experienced, I am eager to have my entire team join the QFPF program. It has truly made a significant difference in our lives and careers

Kavita Bothra, QFPF®, Mumbai”

“

Skills to design tailored solutions



QFPF has been a transformative journey, providing a comprehensive foundation in personal finance. The course, enriched with insightful live sessions led by industry professionals, has equipped me with the skills to design tailored financial solutions and analyze products adeptly.

Vivekh Pathak, QFPF®, Gurgaon”

“

QFPF is a great launchpad



As a 2nd Gen MFD, the QFPF gave me immense value add. The curriculum delved deep into every aspect, we perfected client interaction, consultancy processes, personalized financial plan building, and navigating different personal finance situations guided by the industry experts.

Sumit Jha, QFPF®, Bengaluru”

“

Got hands-on knowledge from veterans



Enrolling for the QFPF course was a game-changer for me as I set up my practice. The hands-on knowledge from industry veterans and a comprehensive curriculum equipped me with everything needed for success in the personal finance profession.

Diipesh Daggha, QFPF®, Mumbai”

“

Got my identity as a professional



I had everything like own office, client base, and goodwill of my family but something was still missing. And that was correct approach towards client by asking right questions and how to do financial planning, etc. QFPF helped me in many ways to get that approach right.

Snehal Patwardhan, QFPF®, Pune”



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Personal
Finance
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