PROFESSIONAL CERTIFICATION

PROFESSIONAL FINANCIAL PLANNER

Course Description:

The Professional Financial Planning Specialization is designed to provide the courses required for the PFPCertification Examination. Students who complete this specialization will:

- possess a foundation in the theory and practice relevant to personal financial planning.
- process the knowledge and skills associated with success in the CFP profession.
- Understand the different ways to present an income statement and cash flow statement.
- Read and interpret the various items in a published income statement.
- Identify the operating, financing, and investing activities of a company.
- Determine what is contained in an annual report and where to find it.

The Training course objectives & Topics:

- This 60 hour course provides Trainees with the training, the materials and the support to prepare for the challenging PFP examination. Completion of this course qualifies as the formal education requirement to sit for the PFP examination.
- The main topics in the training course are:
  - ✓ Introduction to Financial Planning
  - ✓ Risk Management
  - ✓ Investments
  - ✓ Tax Planning
  - ✓ Retirement and Employee Benefit Planning
  - ✓ Estate Planning

Target Audience:

- This course is designed for experienced financial planners who desire to increase their financial planning skills and apply a standards-based approach to financial planning.
- Individuals looking to become PFP certified.

Professional Financial Planner (Project)

- Every participant shall be asked to carry out an eLearning Project under supervision for 4 weeks.

Hint

Certification programme has a total 180 contact hours, divided into two parts:

- 30 hours direct training
- 150 hours for the certification project