

# GLOBAL CERTIFICATION IN GOAL PLANNING



One Day Program Specially Designed by AAFM India for Independent Financial Advisors

**Need Based Planning**

**Client Management Skills**

# INTRODUCTION

Financial Goal Planning is the key to sound Financial Planning. It commences with the cradle and continues till the end, when the person plans wealth distribution. Everybody has financial goals and wants to meet them in a time bound manner; with the advent of many new types of products mutual funds and capital markets, the job of a Financial Advisor has become challenging but rewarding.

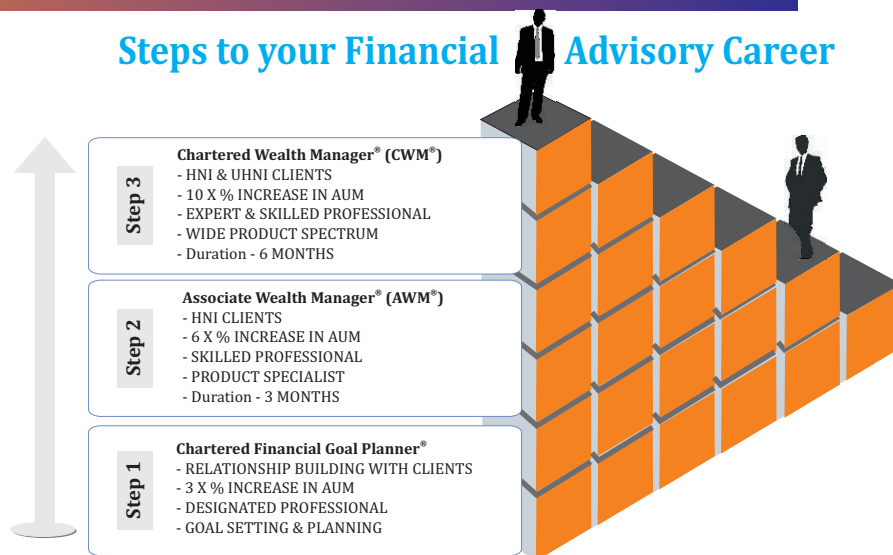
The objective of the program is to make you ready to construct a "Financial Goal Plan" for your clients using modern financial tools so that you can make the client understand Goal Setting better and deliver the Need Based Advisory Planning to client situations and financial goals.

## ABOUT AAFM INDIA

AAFMI<sup>®</sup> has set up its Indian Chapter American Academy of Financial Management India Private Limited, AAFM India (AAFMI) as a Standard Setting Body in India with the objective to promote Financial Advisory & Wealth Management Standards in the country.

AAFMI India is responsible for establishing Curriculum Design, Certification of membership and licensing standards in India. AAFMI India offers various Certifications, Designations and other Educational Programs offered by AAFMI<sup>®</sup> including the prestigious and highest designation globally recognized in various domains.

## Steps to your Financial Advisory Career



## CHARTERED FINANCIAL GOAL PLANNER<sup>®</sup>

### Start Offering Goal Based Financial Advisory Services Immediately

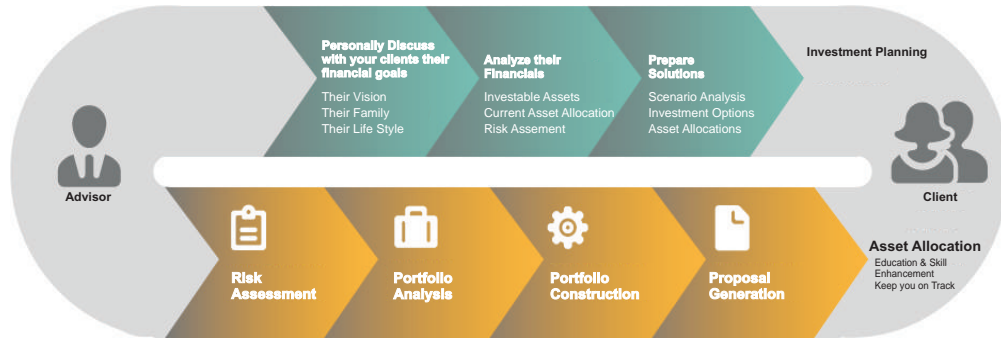


### LEARNING OUTCOMES OF CFGP<sup>®</sup>

- |  |   |
|--|---|
| Basics of Financial Planning                                 | Assessment of risk and Client Behaviour                         |
| Establishing Client - Advisor Relationships                  | Client Attitudes Mapping  |
| Gathering client data and determining goals                  | Financial Health of client                                      |
| Analyze Client Financial Goal, Needs and Financial Situation | Occupational & Hazardous activities                             |
| Goal setting & Prioritization                                | Personal Financial Statement Analysis                           |
| Developing appropriate strategies                            | Time Value of Money Demystified                                 |
| Construction of the Financial Goal Plan                      | Calculation of annuities & Loan Repayment Schedule              |
|  | Real Time Case Study Based Financial Plan Construction on Excel |

# AAFM IS WITH YOU EACH STEP OF THE WAY

## Become a Chartered Financial Goal Planner®



Education & Skill Enhancement Keeps you on Track

## WHO SHOULD ATTEND THE PROGRAM?

Any aspiring or practicing Financial Advisor and / or Financial Products distributor who want to start offering client oriented, process-driven and Goal-based Financial Advisory Services

- ✓ Independent Financial Advisors
- ✓ Registered Investment Advisors
- ✓ Bankers
- ✓ Agents aspiring to start own Advisory Practice
- ✓ Distributors aspiring to start own Advisory Practice

## CFGP Registration Form

**Full Name** : .....

**Date of Birth** : .....

**Email ID** : .....

**Mobile No.** : .....

**Address** : .....

### DECLARATION

I wish to register for the AAFM INDIA Certification Program. I shall submit the following documents along with the registration form failing which I Agree that my application for Student Registration will not be considered by AAFM India Pvt. Ltd.

1. Duly filled Student Registration Form
2. 2 Passport size photo
3. Education Passing Certificate (Duly Attested)
4. Valid ID Proof

I hereby declare that the above information provided by me is true and correct to the best of my knowledge, information and belief. I also agree to adhere to AAFM India Pvt. Ltd. guidelines and instructions. By this registration, I do hereby release AAFM India Pvt. Ltd. from all my claims whatsoever, present or future, which may be caused due to any act or mission by the Authorized Education Provider or otherwise. In case of any dispute which may arise between me and the education provider or AAFM India Pvt. Ltd., the same should be referred to Head – Operations (AAFM India) and the decision taken by the Head – Operations (AAFM India) shall be final and binding without any further claim.

- I am aware of the total fees to be paid for the program i.e. Registration Fee, Courseware Fee, Examination Fee and Certification Fee.
- I have read the Terms of Use Policy, Privacy Policy, Education Delivery Model, Rules and Regulations and Disclaimer of AAFM India and agree to abide by them.
- I am aware that fees once paid is non-refundable under any circumstances and the fees paid is non-transferable.
- I certify that the above information provided by me is true and correct to the best of my knowledge, information and belief.

**Candidate Signature**



# BUILDING WEALTH MANAGERS OF TOMORROW

## AMERICAN ACADEMY OF FINANCIAL MANAGEMENT INDIA PRIVATE LIMITED



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