



CHARTERED PERSONAL FINANCE SPECIALIST®

The Wealth Architect

We Design Your Financial Destiny



AAFM® INDIA: PIONEERING EXCELLENCE IN WEALTH MANAGEMENT STANDARDS

Founded on October 1, 2011, the American Academy of Financial Management® India Private Limited (AAFMI) serves as the Indian Chapter of the American Academy of Financial Management® (AAFM®), USA. AAFM® India was established with a visionary objective: to promote excellence in Wealth Management and Financial Advisory Standards across the nation. As a pivotal standard-setting body, AAFM® India actively collaborates with various stakeholders, including the Government, Regulators, Educational Institutes, Training Providers, Financial Services Companies, and Banks, to enhance the financial landscape of India.

TRAINING EXPERTISE AND CERTIFICATIONS

- AAFM India specializes in customized training for Corporate clients across domains such as Banking, Wealth Management & Advisory, Mutual Funds, Selling Skills, Behavioral Finance, and Estate Planning.
- AAFM® Certifications are recognized as industry-ready and industry-relevant, ensuring professionals are equipped with relevant skills.

CORPORATE PARTNERSHIPS

- AAFM India serves as a training partner for prestigious institutions like Bank of Baroda, HDFC Bank, Union Bank of India, and State Bank of India (SBI Wealth), providing training on Wealth Management to their employees.
- Corporate partners include SBI Wealth, Union Bank of India, HDFC Bank, Aditya Birla Sunlife Mutual Fund, ICICI Securities, Bank of Baroda, and more, offering expertise in various financial domains.

ABOUT AAFM®, USA

AAFM® is a renowned Global name in financial education which is committed to making quality education available to everyone regardless of their geographical location and age limit. AAFM® offers exclusive certified designations, charters, and master's certification to candidates who meet the high standards. AAFM® now has representative offices in the US World Trade Centre N.O. Centre, Hong Kong, Beijing, India, Dubai, Kuwait, Latin America and South America, Singapore, The Caribbean, Europe, and more.

FOUNDATION

- Founded in 1996
- Merger b/w the AAFMA
- and the Founders
- Advisory Committee of the Original Tax and Estate Planning Law Review

GLOBAL RECOGNITION

- AAFM® works with more than 800 Universities worldwide
- 1st USA ISO 29990 Certified and TUV Accredited Body for Training and Certification

PRESENCE

- 151+ countries
- 50000 CWM® Certificants
- 3,00,000+ Global Alumni
- Office in 17+ countries



BEST BFSI

GLOBAL CERTIFICATION AND EDUCATION LEADER AWARDED BY TV9 NETWORK



**BARUN
DAS**

MD & CEO, TV9 Network

**VYAS RAI
NAGPAL**

Director, AAFM® INDIA

**ANSHUMAN
TIWARI**

Editor, Money9



MOMENT OF PRIDE FOR AAFM® INDIA

ACCREDITATION & RECOGNITION



CHARTERED PERSONAL FINANCE SPECIALIST® (CPFS®)



Consequently, there is a growing demand for comprehensive education and training programs that can enhance knowledge and improve professional services in wealth management.

To meet this demand, the **CPFS® program** has been specifically designed to provide with hands-on experience and real-world insights. Throughout the program, you will engage in practical exercises, case studies, and simulations that mirror the challenges faced in day-to-day operations. The emphasis is on developing practical skills that can be immediately applied to enhance client outcomes.

BACKGROUND

The wealth management sector has experienced significant growth due to the increasing availability of investment products and innovative financial services. This expansion has made it a highly attractive and profitable service sector within the global financial industry.

However, this growth also brings new challenges for professionals in the field, such as rapid product development, technological advancements, evolving client needs, and the globalization of businesses.



BENEFITS OF THE CPFS® PROGRAM

ENHANCED KNOWLEDGE AND SKILLS

Acquire in-depth knowledge and practical skills enabling you to provide expert advice to clients

IMPROVED CLIENT ENGAGEMENT

Learn effective techniques for building strong client relationships and setting SMART financial goals, leading to more productive client engagements.

EXPANDED PRODUCT KNOWLEDGE

Gain comprehensive understanding of various investment products to recommend tailored solutions aligned with clients' goals and risk preferences.

ENHANCED DECISION-MAKING

Focus on emotional intelligence helping you to manage emotions and biases for informed investment decision-making.



LEARNING OUTCOMES

- Professional Development and Differentiation
- Proficient Investment Planning Skills
- Knowledge of New Age Investment Products
- Improved Portfolio Management
- Proficiency in Security Analysis
- Client-Centric Benefits



DYNAMICS OF FINANCIAL PRODUCT DISTRIBUTION IS CHANGING VERY FAST!

ARE YOU PREPARED TO?

- Cater to Higher Level of Clients
- Offer Unique & Valued Advise
- Offer New Innovative Products & Services
- Increase your Revenue Per Customer
- Improve your Client Relationships

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PROGRAM STRUCTURE

Program Duration - 70 Hours

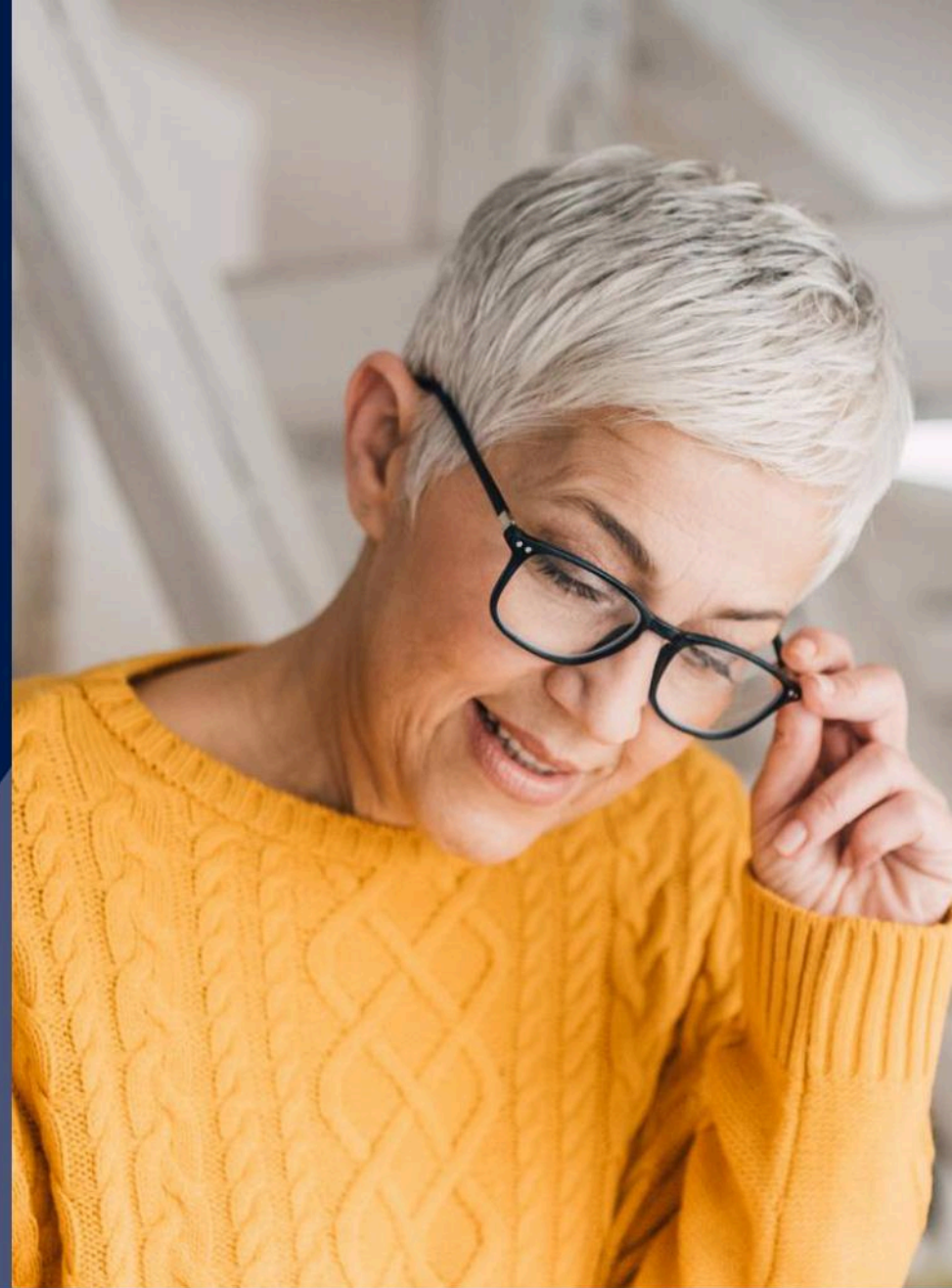
Training

46 Live Sessions of 90 Minutes Each

As per college educational delivery model

Online Assessment & Mock Test

E- Study Material



KEY MODULES:

- Global Financial Systems
- Comprehensive Wealth Management
- Investment Products – Equity, Debt, etc.
- Retirement & Tax Planning
- Personalized Investment Planning
- Portfolio Rebalancing & Asset Allocation

WHO SHOULD PURSUE



1

FINANCE STUDENTS

- Ideal for finance students who wish to build a strong foundation in wealth management, investment strategies, and practical financial decision-making.

2

FRESH GRADUATE

- Any fresh graduate willing to make a career into the investment finance industry, will be equipped with the world class knowledge

3

FINANCIAL INDUSTRY PROFESSIONAL

- A candidate who is already working in the investment finance industry but wants to gain better understanding and recognition.

4

SELF EMPLOYED PROFESSIONALS

- If you are a Self Employed Professional like Chartered Accountant, Financial Advisor, Mutual Fund Distributor, Insurance Advisor, Registered Investment Advisor you will get cutting edge skills to engage with your clients.

5

ACADEMICIAN

- You are teaching investment finance in your university and college. CWM® designation will give you the platform for better research with better credentials and acceptance

6

SELF-UNDERSTANDING

- If you are or willing to understand more about portfolio management or want to equip yourself to manage your wealth then CWM® designation becomes the right choice

1

Financial Mathematics



What is Wealth Management?



Time Value of Money



Present & Future Value



Types of Annuities

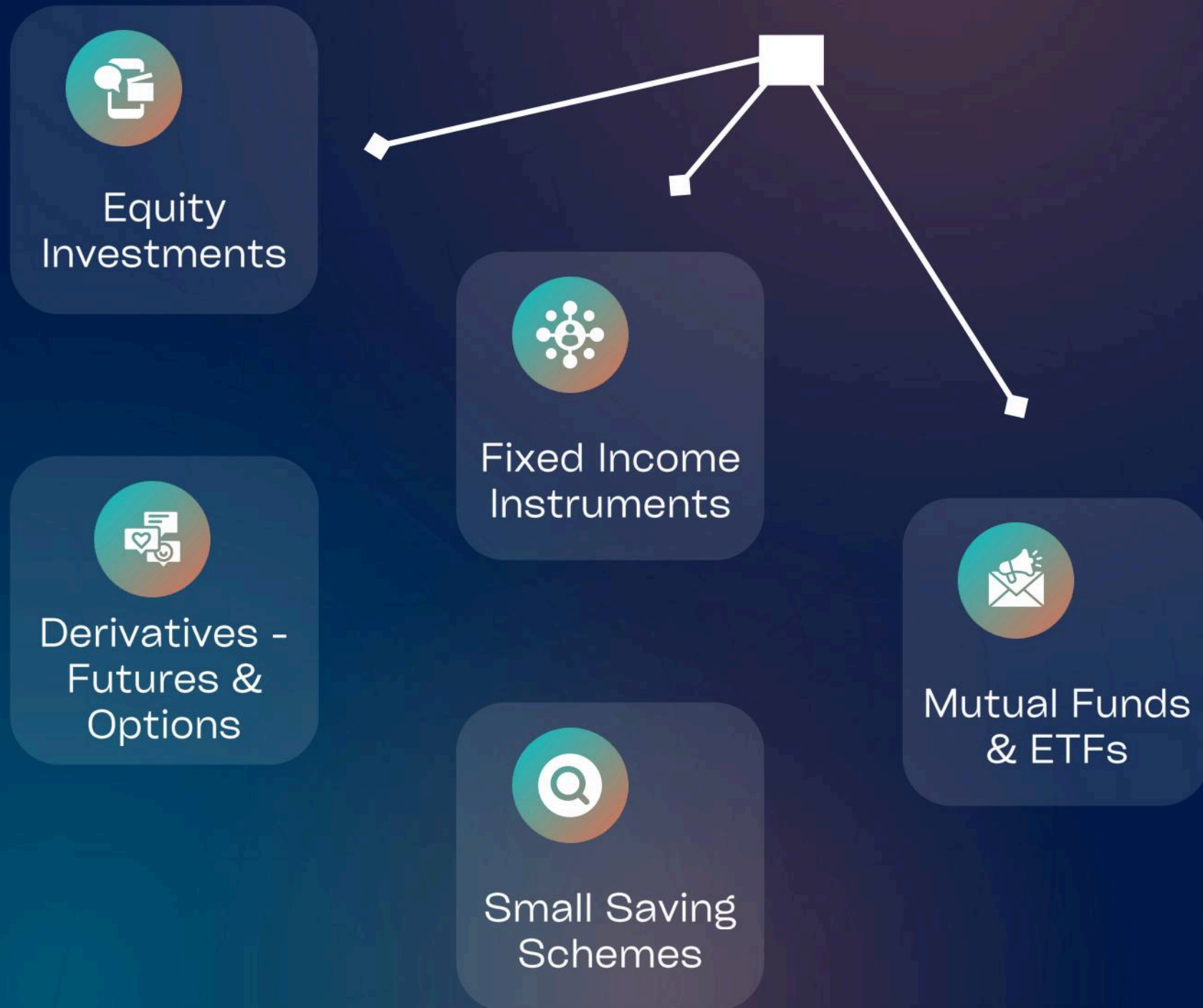


Using Financial Calculator

Duration - 12 Hours

2

INVESTMENT PRODUCTS



Duration - 15 Hours

LIFE SCENARIO & RETIREMENT PLANNING

- ✔ Wealth at Life Stages
- ✔ Retirement Planning Basics
- ✔ Retirement Benefit Plans
- ✔ Employee Retirement Benefits
- ✔ Practical Problem Solving

3

Duration - 12 Hours



TAXATION IN PERSONAL FINANCE

4



Introduction to Income Tax



Income from Salary



House Property Income

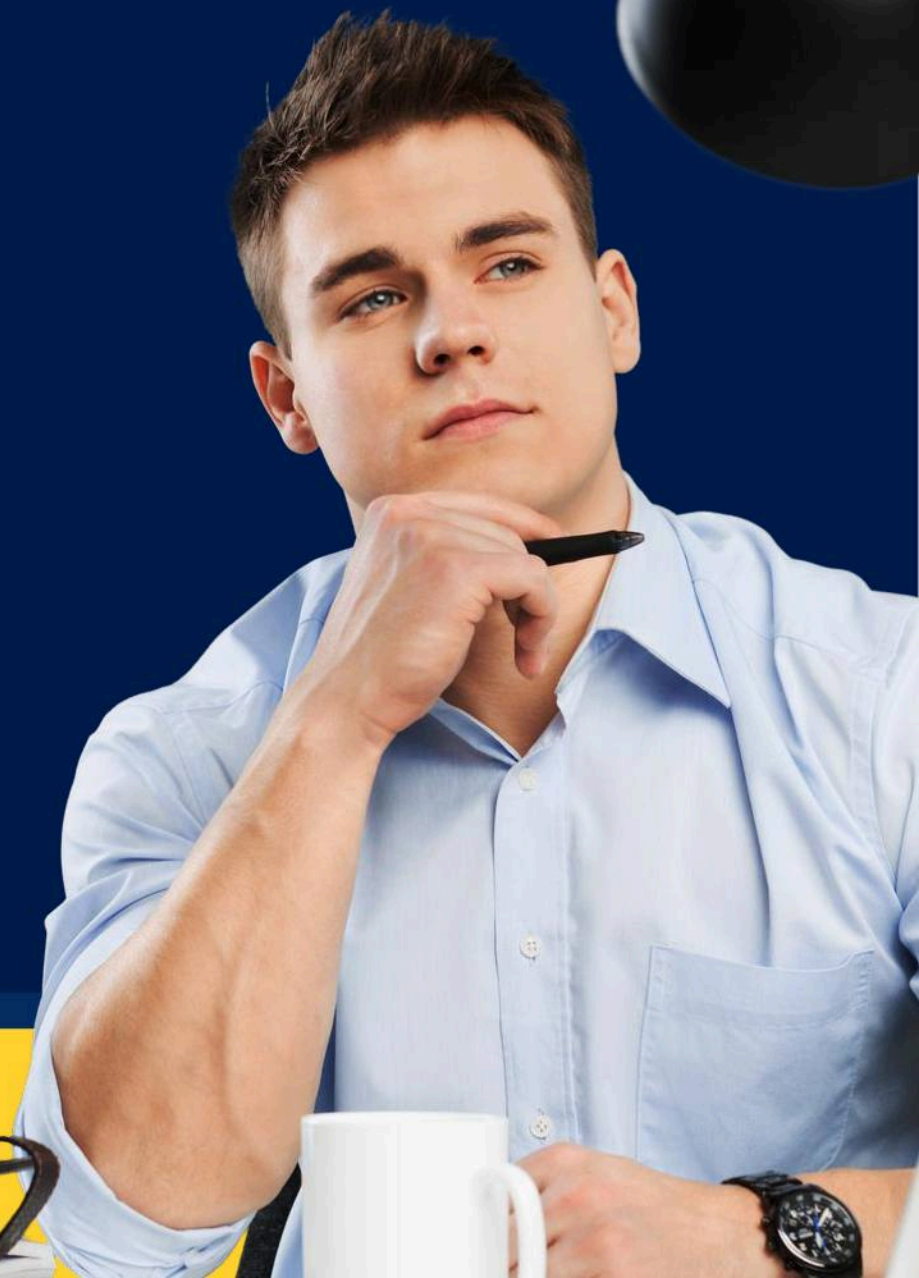


Capital Gains & Agriculture
Income



Other Income & Tax Filing

Duration - 12 Hours



5

Equity Analysis Made Simple



**Fundamental vs. Technical
Analysis**



Valuation Metrics



**Company Performance
Insights**



Technical Analysis Tools



Hands-on Practice

Duration – 12 Hours



WEALTHKRAFT

Case Study base Learning

- ✓ Understanding Case Study Approach
- ✓ Step-by-Step Problem Solving
- ✓ Practice with Real-Life Cases
- ✓ Exam-Oriented Strategy
- ✓ Post-Exam Project Guidance

Duration - 10 Hours

FINAL EXAM - 30 MINUTES

Level up your skills with
the help of our curated
training program

Let's collaborate for academic excellence



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