



Certificate in Financial Planning

Vskills Certifications

Vskills Brochure



Skills for a secure future

Certificate in Financial Planning

Financial planning is a step-by-step approach to meet one's life goals. A financial plan acts as a guide as you go through life's journey. Essentially, it helps you be in control of your income, expenses and investments such that you can manage your money and achieve your goals.

Financial planning helps individuals determine their short and long-term financial goals and create a balanced plan to meet those goals. Tax planning, prudent spending and careful budgeting will help you keep more of the earned cash. Financial planning plays a vital role in retirement planning.

Why should one take Certificate in Financial Planning?

This Course focuses on personal financial planning and is intended for finance and accounting professionals, investment professionals, insurance agents, mutual fund distributors and graduates wanting to excel in their chosen areas. It is also well suited for those who are already working and would like to take certification for further career progression. The certification covers taxation and investments relevant in India only.

Earning Vskills Certificate in Financial Planning Certification enables candidate to differentiate in today's competitive job market, broaden their employment opportunities by displaying their financial planning skills, and result in higher earning potential.

Candidate can also opt for freelance financial advisory and financial planning for high net-worth individuals.

The course covers

- ✓ Financial Planning Basics
- ✓ Bitcoin and Blockchain
- ✓ NFT
- ✓ Risk Analysis and Evaluation

Who will benefit from taking Certificate in Financial Planning?

Financial planners, managers, senior executives in finance or accounts domain benefit immensely by opting for Vskills Certificate. Job seekers looking to find employment in accounts or finance departments of various companies, students generally wanting to improve their skill set and make their CV stronger and existing employees looking for a better role can prove their employers the value of their skills through this certification.

Test Details

- **Duration:** 60 minutes
- **No. of questions:** 50
- **Maximum marks:** 50, Passing marks: 25 (50%)

There is no negative marking in this module.

Fee Structure

Rs. 1,999/- (Excludes taxes)*

*Fees may change without prior notice, please refer <http://www.vskills.in> for updated fees

Companies that hire Vskills Financial Planning Professionals

Fidelity, JP Morgan Chase, Kotak Mahindra, ICICI, HDFC hire financial planning professionals. Financial planners are in great demand. Companies specializing in portfolio management or insurance or mutual funds or financial investment management are constantly hiring skilled financial planners. Various public and private companies also need financial planners for their accounts or finance departments.

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1. Financial Planning Basics

- 1.1 What is financial planning
- 1.2 Financial Planner skills
- 1.3 Financial Planning Ethics
- 1.4 Factors Influencing Financial Planning
- 1.5 Time value of money
- 1.6 Client Profiling

2. Investments

- 2.1 Equity Investments
- 2.2 Debt Investments
- 2.3 Alternate Investments
- 2.4 Estate Planning

3. New Age Investments

- 3.1 Bitcoin and Blockchain
- 3.2 NFT

4. Taxation

- 4.1 Taxation Basics
- 4.2 Tax Planning
- 4.3 Philanthropy
- 4.4 Asset Allocation and Taxation

5. Risk Management

- 5.1 Risk Analysis and Evaluation
- 5.2 Risk Management
- 5.3 Insurance

6. Investment Evaluation

- 6.1 Retirement Planning
- 6.2 Investment Analysis
- 6.3 Financial Strategies Implementation and Review

Certifications

- ▶ **Accounting, Banking & Finance**
 - Certified GST Professional
 - Certified AML-KYC Compliance Officer
 - Certified Business Accountant
 - Certified BASEL III Professional
 - Certified GAAP Accounting Standards Professional
 - Certified Treasury Markets Professional
- ▶ **Big Data**
 - Certified Hadoop and Mapreduce Professional
- ▶ **Cloud Computing**
 - Certified Cloud Computing Professional
- ▶ **Design**
 - Certified Interior Designer
- ▶ **Digital Media**
 - Certified Social Media Marketing Professional
 - Certified Inbound Marketing Professional
 - Certified Digital Marketing Professional
- ▶ **Foreign Trade**
 - Certified Export Import (Foreign Trade) Professional
- ▶ **Health, Nutrition and Well Being**
 - Certified Fitness Instructor
- ▶ **Hospitality**
 - Certified Restaurant Team Member (Hospitality)
- ▶ **Human Resources**
 - Certified HR Compensation Manager
 - Certified HR Staffing Manager
 - Certified Human Resources Manager
 - Certified Performance Appraisal Manager
- ▶ **Office Skills**
 - Certified Data Entry Operator
 - Certified Office Administrator
- ▶ **Project Management**
 - Certified Master in Project Management
 - Certified Scrum Specialist
- ▶ **Real Estate**
 - Certified Real Estate Consultant
- ▶ **Marketing**
 - Certified Marketing Manager
- ▶ **Quality**
 - Certified Six Sigma Green Belt Professional
 - Certified Six Sigma Black Belt Professional
 - Certified TQM Professional
- ▶ **Logistics & Supply Chain Management**
 - Certified International Logistics Professional
 - Certified Logistics & SCM Professional
 - Certified Supply Chain Management Professional
- ▶ **Legal**
 - Certified IPR & Legal Manager
 - Certified Labour Law Analyst
 - Certified Business Law Analyst
 - Certified Corporate Law Analyst
- ▶ **Information Technology**
 - Certified Angular JS Professional
 - Certified Basic Network Support Professional
 - Certified Business Intelligence Professional
 - Certified Core Java Developer
 - Certified E-commerce Professional
 - Certified IT Support Professional
 - Certified PHP Professional
 - Certified Selenium Professional
- ▶ **Mobile Application Development**
 - Certified Android Apps Developer
 - Certified iPhone Apps Developer
- ▶ **Security**
 - Certified Ethical Hacking and Security Professional
 - Certified Network Security Professional
- ▶ **Management**
 - Certified Corporate Governance Professional
 - Certified Corporate Social Responsibility Professional
 - Certified Leadership Skills Professional
- ▶ **Life Skills**
 - Certified Business Communication Specialist
 - Certified Public Relations Officer
- ▶ **Media**
 - Certified Advertising Manager
 - Certified Advertising Sales Professional
- ▶ **Sales, BPO**
 - Certified Sales Manager
 - Certified Telesales Executive

& many more job related certifications

Contact us at:
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