

Testimonials

"71st Success Story" of our Fast Track CFP Training Workshop.

Riha Agarwal-Kolkata (Fresh Graduate –Persuing CFP in Regular Pathway)

She has enrolled "Double Sure Fast Track CFP" Training Workshop-Attended both Video Learning & Classroom Training workshop in our 30th Batch in Kolkata dated 17th to 19th May'13. She was failed twice in her first module exam (Retirement planning in March'13) before enrollment. She has cleared "Retirement Planning @ 1st attempt post workshop on 4th June'13. She is confident to complete all balance 4 exams by 30th July'13.

Riha's Testimonial:

I have cleared my Retirement module exam (which earlier became quite difficult for me as I had already stuck twice in it) that too after 15 days of attending Fast Track Training workshop. Earlier I was a bit confused about getting enrolled with fast track because I had already enrolled with a leading education partner in Kolkata and was disappointed. But I myself have experienced a major difference between the 2.

With the help of Keyur sir only the "Financial mathematics" concepts got clear to me and moreover he provided the right and updated study material and by following his guidelines both minor and major ones (like attempting the paper in ascending order, solving questions on a rough sheet first which I earlier considered a waste of time) helped me a lot . By his training as he himself mentions 70 -75% of paper becomes in our control. Thanks a lot sir.

Regards
9163068499
rihaagarwal@gmail.com

70) Mr. Abhay (07838984765)- Product Trainer with a leading Insurance Broker-Delhi.

Attended our 27th Batch_Delhi_April13 & successfully passed CFP Exam 5/Final on 5th June'13 @ 1st attempt with a "B" Grade.

69) Mr. E. Santosh Kumar (9246800151)- Business Associate- ShareKhan, Hyderabad.

Attended our 15th Batch Vijayawada & passed dated 6th June'13 @ 1st Attempt in Challenge Pathway.

68) Ms. Riha Agarwal (09163068499)- B.Com & CFP Aspirant- Kolkata. Enrolled for our Double Sure Training Workshop in March'13 & successfully passed her Retirement Planning Module exam @ 1st Attempt on 4th June & Aim to complete balance 3 modules by July'13. (Note: she was failed twice in the retirement planning module before joining us.)

67) Mr. Anurag Anand (09310495868)- Established IFA, Passed with the "A" Grade today in Delhi...He attended our 27th Batch in Delhi last Month. He got Sanjay and Gurpreet Case Studies. He had failed twice before attending our Training WS in

Exam 5.

66) Mr. Pradeep Jivan (09810932978)- Retired Banker-SBI, Passed with a "C" Grade CFP Exam 5today @ 1st Attempt post TWS. Attended last month in 27th Batch_Delhi.

65) Mr. Vineet Jain (09909019783)-Area Manager- ING Life, Passed Tax Planning & Estate Planning with a "B" Grade @ 1st attempt 16th May & Retirement Planning on 24th May'13 in Vadodara- He enrolled through Video Learning Kit on 5th May'13 & aim to clear Investment planning & Advance Financial Planning by Aug'13.

I am thankful for the training inputs that have resulted in significant change in grade secured. I have passed TPEP with B grade @ 1st attempt post video learning. Though I have completed RAIP module but I just passed with C grade even though I have completed the Associate exam of III with good grades.

Three important inputs:

- 1) Approach the exam with 1 marks question, then 2 marks and so on. This seemingly small input has been tremendous as I was very much in control
- 2) Use of financial calculator. Previously I used excel that was time consuming but after video learning I came to know different techniques of using financial calculator that too resulted in time saving.
- 3) The video learning has helped me in improving the financial mathematics significantly specially use of p/y and c/y and conceptual clarity it brings in calculations

64) Jagjit Jagoar- Senior LIC Development Officer, Delhi (09953320041) has successfully cleared Investment Planning & Tax & Estate Planning @ 1st attempt post training workshop within one month & aim to clear CFP by June'13. (Attended our 27th Batch @ Delhi in April'13)

MY TESTIMONIAL REGARDING MODULE EXAMS- I.P. & T.P.E.P.

jagjit jagoar <jagjitjagoar@yahoo.co.in> Wed, May 22, 2013 at 9:53 AM

To: shah.keyur@thecfpaspirantclubindia.com

Respected Keyur Sir,

First of all I must thank you for giving me an opportunity to attend your 27Batch held on 19-21 April, in Gurgaon.

It was a fantastic session which cleared my doubts followed by some Important tips like- how to appear in the exam -

(Time-Management), Do's & Don'ts, Goal Setting, Basic Financial MATHEMATICS. All the inputs that you

Provided in the Class/Workshop helped me to clear my two pending MODULES Of INVESTMENT PLANNING

& TPEP. Earlier I was not confident that I'LL be able to clear my these two exams in a very short duration as

My Enrollment was going to expire on 29th May and also I had failed on two earlier occasions.

Anyhow after attending your session I got confidence and your above mentioned tips helped me to crack these

Exams successfully. I am again thankful to you.

63) FCA Ms. Alka Mittal (09820468318), working with Bharti Axa Life as a Manager-Investments)

Successfully passed dated 16th May'13 @ 1st attempt with the "B" Grade. She got Sanjay (Case F) & Gurpreet (Case B) ...She had attended our 24th Batch_Feb.13 in Mumbai. She had registered in Challenge pathway or Direct Exam 5/Final.

100%Guarantee of Success in CFP Exam 5.....Yes this statement is very true when it comes to Keyur Sir's training program. Its not just the training program but the wholesome knowledge imparting process which is very rare to find, be it queries related to the exam, or queries related to the profession, Keyur Sir is available round the clock and always more than happy to help the participants. I would like to take this opportunity to thank sir for making impossible, possible for me!!!!!!!!!!!!!!

Regards,
Alka Mittal FCA,CFP^CM

62) Mr. Srinivasan, Senior Banker (Bangalore)-09663399780-

Enrolled through Video learning Kit in March'13 & successfully completed Investment Planning (Exam 3) Module exam @ 1st attempt with a "B" Grade, Tax Planning & Estate Planning @ 1st attempt on dated 6/6/13 & aim to complete CFP by July'13.

P.Srinivasan <srini_partha@yahoo.com> Mon, May 20, 2013 at 10:49 AM

To: keyur.shah1975@gmail.com

Dear Keyur,

I have cleared the Investment Planning module exam with a B grade @ 1st attempt post video learning.

I should say your video learning kit greatly helped me. Thanks to your sincere efforts in the training sessions. Some of the concepts are explained very clearly in the training sessions and all the material provided by you is quite exhaustive and detailed.

Above all, the case studies and the handwritten solutions are the best part of the learning. Please keep up the

Good work !!

Regards

P.Srinivasan

61) Mr. Anand Gokhale, Fresher & CFP Aspirant passed his CFP Exam 5/Final in month of April'13. Attended Training Workshop in month of March'13 in Mumbai. (09821674334)

Hello Sir,

I am Anand Gokhale. I want to give you a good news that I cleared my Exam 5 /Final module at last week. Sir thank you so much for guide me to clear Exam 5/Final module. My experience about your 3 days workshop for Exam 5 was fabulous. You taught me those concepts like marriage corpus, vacation corpus, education corpus etc...which I really find difficult to solve & those became barrier to clear Exam 5 for me. Before attending your workshop I gave exam 5 for 6 times but not yet cleared. I was very up sate & wanted to give up Exam 5 but you gave me confidence & courage to clear Exam 5. Also you gave me good quality material & post training support. which help me to clear Exam 5. Sir you are LIGHT HOUSE in this CFP education sea which prevent Boat of Student from collapsing to failure rock & gives direction for sailing towards success port. Again thank you very very much for giving proper guidance.

Yours Sincerely,
Anand Gokhale
DBF, CFA(ICFAI), CFP.

60) Mr. Harazika Simanta (Cluster Head- HDFC Bank, Assam)-09863102537

Enrolled through Video Learning Kit in Month of April'13 & successfully passed his CFP Exam 5/Final @ 1st attempt in month of May'13.

Dear Keyurjee,

THANK YOU VERY MUCH.

Simanta Hazarika (Circle Head-Operations, HDFC Bank, Sivasagar, Assam) enrolled for a 19th batch at Kolkata (20th Dec'12 to 23rd Dec'12) and took Video Learning Kit(16th April'13), successfully passed CFP Exam5/Challenge Status Pathway on 7th May'13 with "C" grade.

"Thank you very much Sir, for your kind help and teaching technique, Although I have passed with "C" grade, I am happy to clear the Exam 5, despite of my busy work schedule. I learned the right process & principles which helped me to enhance the knowledge and skills. Moreover, the Video Learning Kit is very helpful, which I can use at any time, any date like ATM. But, one thing I should say the full credits goes to you Sir, without your support, guidance & help it was Simply impossible, as I had started from 'Zero' only."

With regards.
Simanta Hazarika
9863102537

59) Mr. Sundeep Singhal, MDRT/CM Club Member- DELHI (09810093263)

Enrolled through Video Learning Kit (5th April'13) & successfully passed his CFP Exam 5/Final @ 1st Attempt on dated 22nd April'13.

SUNDEEP SINGHAL-DELHI PASS MY CFP FINAL IN FIRST ATTEMPT

Sundeep Singhal <singhal_sundeep@yahoo.com> Wed, May 22, 2013 at 4:11 PM

To: keyur.shah1975@gmail.com

Dear Keyur Shah sir

ALL CREDIT GOES TO YOU IN CLEARING MY FINAL EXAM IN SUCH A SHORT DURATION OF TIME .. I AM LUCKY THAT I FIND A GOOD TEACHER LIKE YOU AND YOUR GUIDANCE AND CORRECT METHOD HELP ME IN CRACKING THE EXAM..

MY TARGET WAS TO CLEAR IT WITH 'A' GRADE AS MY CONCEPT WAS CLEAR .

FINAL MODULE NEED A GOOD PRACTICE BUT I ALREADY BOOKED MY EXAM DATE BEFORE MEETING WITH YOU I GOT LESS PRACTICE TIME BUT ANYWAY I CLEARED IT IN FIRST ATTEMPT AND I REQUEST YOU SIR THAT WHENEVER YOU COME TO DELHI YOU HAVE TO COME TO MY OFFICE OR I WILL COME TO MEET YOU ...

Rgds

SUNDEEP SINGHAL(CFP)

M/S SECURE LIFE

226, Ring road mall, manglam palace, Sector-3, Rohini, Delhi-110085

ph-09810093263,47073939.

www.securelifess.com

58) Mr. Naveen Kanth, (Director- BFSI Academy and BFSI hiring.com, Hyderabad)- 09848999276

Enrolled for Video Learning Kit (25st March)- Successfully passed CFP Exam 5/Final in Challenge Pathway on 19th April @ 1st Attempt with a "B" Grade.

"I found the Video Learning equivalent or better than the classroom training workshop. The Advantage was that I could run video 2nd time when particular topic could not understood first time and also gave me flexibility to learn at my convenient time without leaving home. The Mr. Keyur Shah had extended his full support during my post training preparation through mail/phone.

57) Mr. Nikhil Khatiwala, (Established Independent Financial Advisor- Pune)- 09822206851

Enrolled for Video Learning Kit (3rd April)- Successfully passed CFP Exam 5/Final in Regular Pathway on 19th April @ 1st Attempt.

Thank you very much for making me CFP !!!!

Nikhil Khatiwala <renukainvestments@yahoo.com> Wed, May 22, 2013 at 6:35 PM

Reply-To: Nikhil Khatiwala <renukainvestments@yahoo.com>

To: "keyur.shah1975@gmail.com" <keyur.shah1975@gmail.com>

Dear Keyurbhai,

First let me thank you for your whole heartedly and timely support, which helped me pass CFP exam.

Your Video learning kit is 100% worth. It really gave me in-depth knowledge of the topic. It showed me some new techniques to use financial calculator to solve tough calculations.

I had cleared all the four modules, and had attempted the 5th Module for the first time on 25th Feb 2013, in which I failed. I was upset and demotivated. I had cleared all the 4 modules at one go in B grade. So could not believe that I had failed in the final module. Then again with vigor I booked the seat for Final module (Advance Planning) for the date 19th April 2013. But I was not prepared. Then suddenly I got the mail of Mr. Keyur Sir, and I had a conversation with him on the phone, and opted for Video Learning. The very next day I received the Video Learning Kit, date was 02nd April 2013.

Mr. Keyur Sir told me to study sincerely as there were only 17 days left for exams. When I started with the video Coaching, on the first day my confidence was raised and I was sure that I will pass the exam. I studied as per the instructions given by Mr. Keyur Sir. If there were any queries I would call him in evening from 6pm-10pm and he would sincerely answer all my questions. But I will tell you When you will go through the video learning all your doubts will be cleared. You will start solving complicated Questions in minutes and accurately.

The video learning is the perfect way to study for the final exam, as, if you want to repeat some part, you can easily do it. It's as if Mr. Keyur is teaching live and that also with comfort and ease of relearning. The e-study material provided by Mr. Keyur Sir, is in abundance. It has got plenty and plenty of questions and answers on all the related topics and Case studies.

I cleared my final module on 19th April 2013 and I am CFP now. Many many thanks to Mr. Keyur Sir. It's just because of Mr. Keyur Sir, that I am CFP.

I will say that anyone who wants to clear the CFP exams and with good grade should go with Video Learning Kit.

You can make out that this man is not just for money, but he wants his students to pass the CFP with good grades, who will leave no stone unturned for his student. Once again I thank Mr. Keyur Sir. I wish Mr. Keyur Sir all the best to make all his students a CFP !!!

"Thank you, Your Teaching method was very good. It had helped to fine tuned financial mathematics & financial planning calculation concepts/methods. I learnt the right process & principles and really helped me to enhance my domain knowledge and skills. Your approach of financial plan goal calculations is helping me in practical life and helps me to enhance conversion rate and ticket size. I am also planning to start my fee based financial planning service on immediate basis.

Nikhil Khatiwala
Insurance and Investment Advisor
"Creating Wealth. Protecting Families."
<http://www.renukainvestments.in/>
B5 Vijayshree Towers,
Dattwadi,
Pune 411030.
9822206851

56) Mr. Chitral Shah, Manager, Kotak Securities-Ahmedabad-09998172990

Attended our 20th Batch in Jan.'13 & passed @ 1st attempt with a "B" Grade in April'13.

55) Mr. Kamal Kothari, Visiting faculty for ICWA/CA/CFP/Finance in Nagpur-09823138489

Enrolled through Video Learning Kit (In March)- Successfully passed CFP Exam 5/Final in Regular Pathway on 16th April.

Dear Keyurji,

Hope you are doing fine.

I am thankful to you for guiding me through success in CFP. Before taking your classes, aim was just to clear CFP and get the certification. This was particularly so because I have heard from many friends and acquaintances that CFP level 5 is very tough to crack. However, 2 things made CFP extremely easy for me. Firstly, conceptual clarity provided in very organised manner and secondly, usage of Financial calculator instead of Excel working. I am now so better equipped with CFP subjects knowledge that I am now very enthused to share it with others and make CFP simplified for them too.

Thanks once again.

Best regards,
CMA Kamal Kothari
Cell : 09823138489

54) Mr. Altaz Khakiani, VP- Software Development (Morgan Stanley)- Passed with a "B" Grade @ 1st Attempt on dated 1st April'13 post training workshop. (Attended our TWS in month of Feb.'13)- 09820712667)

Hi,

When I joined Keyur's sir 3 day classes, I was skeptical how I would be able to prepare myself for CFP exam 5 as my background is software development. Sir did an excellent job in teaching us the right process and technique to pass the exam. Even though I am glad I passed my exam 5 with grade B in first attempt, the amount of knowledge I got from these 3 days of training is priceless. The best part is post training support that Keyur Sir provided me until the day I appeared for my exam.

I highly recommend Keyur Sir for CFP exam 5 prep.

Thanks,
Altaj Khakiani
VP - Morgan Stanley Wealth Management

53) Surabhi Verma, (Ex. Banker and Independent Financial Planner)-Passed with a "B" Grade @ 1st attempt on dated 26th March'13 post training workshop. (Attended our Fast Track CFP Exam 5 TWS in Jan'13 in Mumbai) 9702454350

Dear Keyur Sir,

This is to thank you for your to the point guidance and post workshop help as well which has been very instrumental for me in clearing my Exam 5. The approach in understanding the questions and the way to attempt it not just with correct procedure but also with apt logic has been very useful for me.

Also, your help pertaining to the updated questions and solutions, your availability on the phone and mails for clarification of the smallest doubts, and focussed approach for clearing the paper is really credible.

Thanks again Sir for your guidance, support and encouragement.

Thanks and Regards
SURABHI VERMA

52) Mr. Rajnikant Tiwari, Manager (Sales)- Diawa MF, Passed with a "B" Grade @ 1st Attempt on 23rd March (Attended our Training workshop in Month of Jan.'13)

Thank you very much *** cleared CFP advanced module in 1st attempt.

Rajnikant Tiwari <rajnikant1984@gmail.com> Mon, Mar 25, 2013 at 4:15 PM

To: "THE CFP ASPIRANT CLUB (INDIA) KEYUR SHAH" <keyur.shah1975@gmail.com>

Dear Sir,

I am happy to share with you that i have cleared CFP in Exam 5 Advanced Module in 1st attempt with a B grade.

Keyur Sir has very good knowledge of the subject, he had designed the overall flow of the program very well and it was easy to understand. I bothered him a few times after the training, every time he was more than happy to help me. Post training e-mailer"s and question bank was very useful . i strongly recommend Keyur sir's training to all financial professional who wish to do CFP advanced module."

Thank you very much once again for your support and guidance

With warm Regards,
Rajnikant Tiwari
9930435861

51) FCA Mr. Rajesh Kuttikkat , Senior Finance Manager is working with a leading MNC had Attended 23rd Batch in Kochi dates 25th to 27th Jan.13 and passed @ 1st attempt CFP Exam 5 with a "B" Grade in just one month post training workshop.

Rajesh kuttikkat <rkuttikkat@yahoo.com> Wed, Feb 20, 2013 at 1:31 PM (CA & Senior Finance manager with MNC (Fragomen) in Kochi)

To: Keyur Shah CFP <keyurcfp@thecfpaspirantclubindia.com>

Dear Mr Keyur,

Thanks for coming to Kochi and conducting the Workshop so that within one month, three participants who took the exams qualified the exams. I am sure the success story will continue with all other participants. Wishing all the participants the best wishes !!

I owe my success to the following factors:

a) As a trainer, you have given us specific direction on how to approach the exams. Five step process including drawing the right time line was a "learning" for me who opted the CS route. This made the studies very interesting and problems less "problematic".

b) Financial Calculator - I was really skeptical when you mentioned about the calculator. I thought that this will be additional and unnecessary expenditure. I was not used to the financial calculator and used to practice in MS Excel. But your workshop, post training sessions and the exam proved it otherwise. It was not an unnecessary expenditure but a capital investment, the benefit of which is reaping now. The calculator was truly awesome and thanks for recommending and giving us training on this.

c) Success doesn't come by mere luck. You have to put lot of effort to taste success. Due to my job responsibilities and family matters (including managing a 10 month old baby), I was finding it difficult to manage the time. Since stretching of 24 hrs is not possible, I have to plan the study time accordingly. (I always believe in "Plan your work and Work your plan"). Putting extra hours, sleeping less hours, "tweaking" some office time, cancelling all extra appointments / weekend "get togethers" were one strategy.

e) Practice, practice, and more practice.....:) Obviously another strategy.

f) Group study or interaction with other participants is another strategy. Ranjith has helped me in this regard. He redefined my clarity of concepts and refined my knowledge levels. Thanks Ranjith and Hearty Congrats on your success.

g) Time management - Pre exam preparation should include attempting the mock test in a typical exam environment. This will increase your confidence level, that is for sure. I am the living example :) I got Ashwin (Case A) and Sanjay (Case F) in my exams and is attaching some questions that I felt unique. There were two or three questions which was really tough for me and has to guess that answers. One question is about computing the net worth of Sanjay after 5 years from now (with all sorts of adjustments). Even in an AC environment, you will sweat it out after reading these type of questions :). Read the questions atleast twice to understand the "hidden agenda". Wishing all the participants the very best in life.

Rajesh K
9746333661

50) Mr. Maxi Jose, Leading IFA in Kochi had Attended our 23rd Batch in Kochi dates 25th to 27th Jan. 13 and passed @ 1st attempt CFP Exam 5 with a "B" Grade in just one month post training workshop.

Maxie Jose <maxiejose@affluenz.in> Mon, Feb 25, 2013 at 2:09 PM
To: Keyur Shah CFP <keyurcfp@thecfpaspirantclubindia.com>

Good Day Mr. Shah,

At the outset I must thank you for the excellent workshop conducted in Kochi. Three of the participants have cleared CFP within three weeks is a testimonial to this. I am confident that there will be many more success stories and you could soon be proud of 100 % results for the Kochi batch.

- I owe my success entirely to you and your focus towards cracking the exam. I must admit that I have been a culprit to
 - Not follow some of the rules advised by you.
- Mantra for success is hard work and practice. Solve as many questions as possible.
- Though I did not book my exam one month in advance, I would strongly recommend it to all.
- Financial calculator would be the best way for most solutions except for some like Moneyback policy calculations. Despite my initial inhibitions, I found that use of a calculator makes it much easier and faster.
 - Do not overlook the 2 and 3 mark questions, they can be crucial for passing as well as getting good grades. They were simple and were the saving grace.
 - Though the basic format was as advised by you, some questions were tricky and needed thorough understanding of the question as well as concepts.

Thank you again for your support, particularly for the late evening queries during the last two days.
Warm Regards

Maxie Jose
CERTIFIED FINANCIAL PLANNER^{CM}

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Level 1, MIG 386, Panampilly Nagar, Cochin - 682036

Off: +91 484-2311790, 6462098

eMob; +91 9495218492

maxiejose@affluenz.in

49) Mr. Ranjith Senior BFSI Professional had attended 23rd Batch in Kochi dates 25th to 27th Jan.13 and passed @ 1st attempt CFP Exam 5 in just one month post training workshop.

ranjith v.m <ranjithvm1@gmail.com> Mon, Feb 25, 2013 at 10:24 PM

Hi Keyur,

First of all, thanks Keyur for conducting such a great workshop in Cochin for the CFP aspirants like me. It helped me understand the pattern of the exam and how to approach it like how to plan the time and prioritize the questions.

The five-point system you introduced gave me clarity on how to approach a problem and to achieve more accuracy in the calculations.

I was not fully aware of the possibilities of 'begin' and 'end' in the financial calculator. Thanks a lot for letting me know about that.

The Mock tests which you provided in the last days was a great help in boosting my confidence.

Hard work, regular practice and time management are the three big factors behind my success.

The most special thing about this workshop was the opportunity to meet other CFP aspirants in and around Cochin.

Thanks a lot Anoop for letting me know about the workshop, Vijay for the combine study sessions and Rajesh Kuttikkat for discussing and sharing his views on solving various complex questions.

Regards,
Ranjith V M (09846998228)

48) Mr. Hiren Pandya, Senior BFSI Professional had attended 20th Batch in Ahmedabad dates 4th to 6th January'13 and passed CFP Exam 5 @ 1st attempt on 25th Feb.

(Mr. Hiren was failed four times before attending a training workshop)

Hiren Pandya <hiren.pandya@trustplutus.com> Tue, Feb 26, 2013 at 6:22 PM

To: keyur shah keyur.shah@thecfpaspirantclubindia.com

Dear Keyurbhai,

It has been a tough time so far but finally with your guidance and mentoring could crack CFP..

All thanks to your faith in me .

Will never forget this journey !!

Warm Regards,

Hiren Pandya

Associate Director , Client Relations - Ahmedabad

TrustPlutus Wealth Managers (India) Private Limited™
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Tel: 079 - 4040 3802 ; Fax: 079 - 4040 3839

Mobile: +91 9879597372

hiren.pandya@trustplutus.com

www.trustplutus.com

47) Mr. Minesh Rana, Attended our 20th Batch in Ahmedabad dates 4th to 6th January'13 and passed CFP Exam 5 @ 1st attempt on 25th Feb.

Baroda, Business Associate of Motilal Oswal and IFA (09925223467)

(Mr. Rana was failed three times before attending a training workshop)

46) Mr. Vijay Senior BFSI Professional had attended 23rd Batch in Kochi dates 25th to 27th Jan.13 and passed @ 1st attempt CFP Exam 5 dated 4th March'13- (0895419897)

vijay prabhu <uvp@sify.com> Mon, Mar 11, 2013 at 4:33 PM

To: Keyur Shah CFP keyurcfp@thecfpaspirantclubindia.com

Sub.: From Aspirant to Achiever

Dear Sir and all my Friends,

Feeling happy and a bit relieved after clearing the exam. It was a great moment for me. Long cherished one.

Thanking Guru Keyurji for showing us the right path to reach the success (I think you almost took us till the doorstep and we just had to knock the door) .

All my friends were of great support and motivation in this achievement.

Those days long sessions with Ranjith were the building blocks.

There is no short cut to clearing the exam. Practicing the mathematical problems and thorough knowledge of concepts is the key.

Thanking you sir for the continuous support.

Regards

Vijayanand

45) Mr. Priyesh Chokshi, leading IFA & Stock broker based in Mumba had attended 24th Batch dates 15th to 17th Feb.13 and passed with the "B" Grade @ 1st attempt CFP Exam 5 in just one month post training workshop-09820224126

Priyesh chokshi <priyeshchokshi@hotmail.com> Sun, Mar 10, 2013 at 6:52 AM

To: keyur.shah1975@gmail.com

Dear Keyur Sir,

I want to sincerely thank you for all the efforts you have taken starting from 3 day crash course till the last day of the examination. Your 3 day crash course was very good & effective as it almost cleared all concepts. Your

The importance of the 5 step process made the question paper looked simpler to understand and passed the examination easily.

Your dedication towards helping the students in clearly doubts is tremendous.... Encouraging the students till the very last day Helps to build confidence in them.

As you clearly say 50% I can provide with understanding the concept & rest 50 % lies with your 200 hours of practice post training.... for passing the CFP Exam.

I again thank you for the wonderful training & knowledge passed to us.

Wishing you all the best for your future endeavors.

REGARDS

PRIYESH CHOKSHI

09820224126

44) Mr. Arnab Chetarjee- IFA, Kolkata, Passed with the "A" Grade @ 1st attempt post training on 29th Jan.'13 (Cell 09836264672)- Attended Training workshop in Dec.12.

Dear Sir,

I am highly obliged to you for your guidance and support. Without you it would have not become possible. You are like a guiding star to me and i guess to the other CFP aspirants as well. The right methods taught by you, not only helped me clear the exam, but has imbibed me with good technical knowhow, which i feel will be of great help throughout my career in ' Financial planning '. Thank you very much.

With regards,

Arnab Chatterjee,arnab.planner@gmail.com

43) Mr. Taresh Bhatia- Delhi-Passed with the "A" Grade post Training on 30th Jan.13. (Cell no. 09810144683) - Chief Knowledge Officer, Advantage Consultants- Attended in Nov.'12.

Hello Keyur,

When the opportunity came, it appeared in a different form, and from a different direction than I had expected. That is one of the tricks of opportunity. It has a sly habit of slipping in by the back door, and often it comes disguised in the form of misfortune, or temporary defeat. Perhaps this is why so many fail to recognise opportunity

.... CLEARED MY FINAL CFP EXAM TODAY!

With your help, kind cooperation, guidance, techniques, approaches, methods, sample paper, it made my path more clearer to towards clearing the final CFP exam today. Your persistently saying that I will get A grade brought more confidence on every call to you and I actually got A grade today! Of course, I had to really really work very hard, cutting off the outer world and concentrate on my studies but then this also taught me how to bring what you actually DESIRE! Many thanks Keyur!

TRULY, "thoughts are things," and powerful things at that, when they are mixed with definiteness of purpose, persistence, and a BURNING DESIRE for their translation into riches, or other material objects.

A little more than THREE years ago, I discovered how true it is that men really do THINK...MY discovery did not come about at one sitting. It came little by little, beginning with a BURNING DESIRE to be a [CERTIFIED FINANCIAL PLANNER^{CM}](#)

One of the chief characteristics of My Desire was that it was definite. Observe, carefully, the description of translating my DESIRE into reality, and you will have a better understanding of my success principles! When this DESIRE, or impulse of thought, first flashed into my mind, I was in no position to act upon it. Many difficulties stood in my way. These difficulties were sufficient to have discouraged the majority of men from making any attempt to carry out this kind of a desire!

But mine was no ordinary desire! I had learned, from years of experience, that when a man really DESIRES a thing so deeply that he is willing to stake his entire future on a single turn of the wheel in order to get it, he is sure to win. I got this opportunity! that I had asked for, because I had made up my mind to stand by until I succeeded. And got Success today... more to come..

Shall always seek your blessings and cooperation in times to come.

Best wishes and many Thanks, taresh@advantagefp.in

42) Mr. Allan Pereira- Passed with "A" Grade @ 1st Attempt post training, Mumbai-Senior BFSI Professional ON 19th Dec.'12(Cell no.09820581508)- Attended training WS in June'12.

41) Mr. Akhil Maediratta, entrepreneur, TitaGarh, Orrisa, Passed @ 1st attempt on 28th Jan.'13-Subscribed "Video Learning Kit" in the month of Oct.'12 (Cell no. 09437069007)

40) Mr. Ravikant, Senior BFSI Professional , Hyderabad, Passed with a "B" Grade on 25th Jan.'13- Subscribed Video Learning Kit in month of Dec.'12 (Cell no.09989951612)

39) [Mayank Patel, IFA, Bardoli, Gujarat](#) passed his CFP exam 5 first attempt with a "B" grade. (Attended our training workshop in the month of Oct.'12-09537459696)

38) Rajiv Ledwani- Mumbai, Passed his CFP exam 5 first attempt. (Got job in IIFL advisory post CFP, Attended training workshop in the month of Dec.'12, 09960101000)

37) [K. Seenivasan, Senior Manager with ICICI Bank Chennai](#), Passed his CFP exam 5 with a "B" grade (attended a training workshop in the month of Sept.'12 in Chennai-08148453448)

36) Mr. Naresh Panjannani, Senior Stock broking Professional & Established IFA- Passed CFP certification in the month of Nov.'12- Attended Training Workshop in the month of Sept.'12 (Cell no. 09821078655)

35) [Prabakaran. J, Senior Training Manager- Banca-Max life insurance Chennai](#), Passed his Retirement planning (exam2) 1st attempt with a "B" grade post training workshop and aim to complete CFP by May'13. (09944044846)

34) M. K. Jayaprakash, regional manager & AVP-Motilal Oswal, Ahmedabad, Passed his Tax Planning & estate Planning (Exam 4) with a 1st attempt within one week from completion of the training workshop. (09879583119)

32) Rupali Rane Attended in 18th Batch_Mumbai dated 7th-8th-9th Dec.'12 and passed her CFP Exam 5 1st attempt post training on dated 26th Dec.'12.

Your process is really good. I followed all your guideline and whatever you taught us in your workshop. If we follow that 5 step method then we can easily solve any Question regarding Retirement corpus, Insurance cover , Higher education goals, world tour corpus, etc. And solving case studies like a real exam give confidence to attempt CFP exam 5.

Thanks' a lot sir, for Your Well wishes, encouragement and valuable support.

Warm Regards,
Rupali Rane CFP.

rupali.rane63@yahoo.in. Contact detail: 09833387663

31) Valerian DSouza, IFA- thane, Mumbai, Passed his Retirement planning (exam 2) with a "B" grade post training workshop. (Attended in Dec.'12 in Mumbai-09322210891) & Tax Planning & Estate Planning Exam in month of May'13 & aim to complete CFP by July'13.

30)Priya Shah (09870624732)-Mumbai- I had already attended Exam 5 training from a leading institute but not confident about the Exam 5 and had to join the Freedom financial planner post CFP. I had attended FAST TRACK CFP EXAM 5 training workshop in the month of Sept.'12 and successfully passed Exam 5/final with the "B" grade @ 1st attempt. Now, I am working with the Freedom Financial Planner.

29) Mr. Ashok DB, IFA-Shimoga, passed his CFP exam 5 @ 1st attempt post training workshop in the month of Dec.'12 (Attended training workshop in July'12 in Bangalore-09880244288)

28) Shyam Jaiswal, Hyderabad, subscribed "Video Learning Kit" and Passed Insurance planning (Exam 1) and aim to complete CFP by April'13.

27) Rajesh.rajgopal <rajesh.rajgopal@religaremacquarie.com> Tue, Nov 6, 2012 at 5:11 PM

To: keyur shah <keyur.shah@thecfpaspirantclubindia.com>

Dear Sir,

Greetings and trust you are fine.

I am glad to mention that I passed the exam 5 today . I thank you to the bottom of my heart for the Guidance you had given during the fast track module in Chennai, without which this would not have been possible.

I got C grade, but it's because I had not been as focused as you had asked post the classes and I must have spent only a couple of quality days revising. Just because I was methodical , as you had told, in approaching the exam today, I could qualify.

Thanking you again. I look forward to meet you on your next visit to Chennai.

Warm Regards
Rajesh (09176999397)

26) Mr. Manoj – Senior Manager, UTI MF attended in Sept.'12 at Chennai and passed Exam 5 in the month of Nov.'12 (1st Attempt) (09840304992, crmanoj@gmail.com.)

25) Mr. Aditya Lakshman Rao- Zone Training Manager (Passed Exam 3, 4 and Exam 5) - Metlife Insurance, Mumbai.

Aditya Rao <aditya.lakshman@gmail.com> Wed, Nov 28, 2012 at 4:40 PM

To: "THE CFP ASPIRANT CLUB (INDIA) KEYUR SHAH" <keyur.shah1975@gmail.com>

Dear Keyur,

At the outset, I would like to inform you that I cleared my Final Module of CFP.

I would like to take this opportunity to thank you, for all the support given. Without which it wouldn't have been possible.

To give you a quick background, I met you at a time when I was almost on the verge of giving up CFP. I registered for CFP in 2007 and had not given exams consistently due to lack of guidance and coaching.

While I had cleared 2 Modules, Risk Management and Retirement, I had failed in Investment twice and was slowly losing interest.

After attending your workshop in July, I cleared Investment, Taxation and Final in matter of Just 4 months, amidst of a lot of professional and personal commitments.

I guess all one has to do to clear the exams after attending your workshop is to keep in touch with you and your mails. Practice is a given and there is no escaping from that. But being in touch with you and your mails helped me in anticipating the questions and prepare for the same.

While the Workshop gave an overview, doubt handling sessions give guidance to take the learning from the workshop forward.

Even simple tips like, taking a case study like a test with time limits goes a long way in helping us to face the exams. Your dedication and commitment is proven by the fact that, you had connected with me on Skype at 9:30 PM from Delhi after a workshop just clarify doubts and give last minute tips. A special thanks for that.

Thanks a ton and I am sure with your guidance, there will be many more CFPs in the country.

Warm Regards

Aditya Rao

Zone Training Manager (Metlife- Bancassurance vertical), Mumbai.

09619640950

24) Mr. Avinash Poddar (Established CA based out of Surat and MD of well known "Tarun" Group- office no.0261-402327) passed CFP Exam 5|FINAL|AFP in month of August.12. I had enrolled in challenge status and failed twice and later on I had attended our FAST TRACK CFP EXAM 5|FINAL|AFP training workshop in the month of May in Mumbai. I learned the right method of various Goal Corpus calculations and finding investment required, concepts of Insurance to Estate planning with us and practiced well and successfully passed CFP FINAL|Exam 5. I found that there is need of personal financial planning among all families and I have decided to promote the Financial Planning Movement in South Gujarat and became Authorized Education Partner with FPSB India (Franchisee of Vantage Institute of Financial Market) and also plans to launch soon Fee based Financial planning practice in South Gujarat.

23) Mr.Mohish Damani (09833343021)- Professional Independent Financial Advisor (Ex. ICICI bank Wealth Manager)-Mumbai

I was stuck in tax planning and failed twice. Later on, I attended FAST TRACK CFP Exam 5 training workshop in month of July'12.

I passed "Tax planning & Estate planning" module in the next fifteen days with a "B" grade. I have successfully passed the Final/Exam5 of CFP in the month of Oct.'12. The knowledge I learned in the training workshop helped many ways in practical life and now I have already launched fee based financial planning practice.

22) Mr.Makrand-Pune (09049049700)- Established Independent Financial & Tax Advisor-Pune

I had enrolled in the "Challenge" pathway (Directly for Exam5/Final) in the year 2010 through Reliance MF and failed twice. Fortunately, I had attended FAST TRACK CFP Exam 5 training workshop in month of June'12 and Keyur Sir had always extended quality post training support and now, I am a CFP certificant. (Passed in month of Oct.'12)

21) Mr.Rishi bhowal (9903084593) Kolkata- working with IIFL as Senior Advisor. -Passed exam 5 in month of Oct.'12

I was hesitating for enrollment due to the cost because I had already attended training and failed but finally decided to attend a training workshop in kolkata Aug'12. After two days of the training workshop, my 99% doubt and queries were resolved and found a high level of confidence. Keyur Sir has exceeded my expectation for training and also provide good post training support.

20) Mr. Birju Acharya (9825126655): I have successfully passed the CFP Exam 5/Final/AFP module with "B" Grade in month of August'12. I am an established Independent Financial Advisor and Share Broker based out of Patan, Gujarat..

I had joined our FAST TRACK CFP EXAM 5/FINAL/AFP module preparation training workshop @ Ahmedabad dated 2nd and 3rd June'12 and he made a good preparation / practice for almost 100 hrs+ and successfully passed Exam 5 with "B" Grade on dated 21/8/12. Keyur Sir's teaching methodology was simple and easy to understand various concepts and calculations and way he taught the financial calculator was made my life easy and also use in day to day practical applications with clients. The way KeyurSir taught various persuasion techniques which gave me confidence to put Knowledge in practice and client enjoyed the experience and my conversion rate and ticket size almost are doubled. Now, I am ready to launch immediate basis FEE based financial planning practice.

19) **Mr.Paresh Patel (Manager-Sate Bank of India-09825129701)** I had enrolled challenge status (Direct Final module) pathway 6 months before and was struggling to find the right coaching for me. One of my colleague referred Mr.Keyur Shah and I attended FAST TRACK CFP EXAM 5 preparation training workshop last month in Ahmedabad. It was a really quality training provided a sound understanding of personal financial domain knowledge and skill. Post training, Keyur Sir provided 24*7 supports till I passed the exam 5. I have cleared CFP exam 5/Final module with B Grade within 2 months of attending the workshop

18) Abhishek Khudania (09830360202), Kolkata works with Client Associates (Wealth Management & Family office)

Sir, Thanks a lot for your guidance and support; which helped me sail through. The workshop helped me not only in clearing the Examination but also have a enhanced clarity and understanding on various topics. A Guru & his knowledge are always cherished and I shall always thank you for helping me achieve a milestone in my career.

Note: Abhishek has attended our Training workshop at Kolkata dated 18th & 19th Aug.'12 and successfully passed CFP AFP/ Exam 5 on 31st Aug.'12.

17) V. Karthikeyan Bangalore(9844252299): I am an Established IFA / LIC Advisor & enrolled in a regular/Self study pathway. I had attended Keyur Sir's training workshop in Bangalore last July'12. I learned systematic approach (Four Step Process) and most of my doubts were cleared during the workshop which gave me solid confidence. I practiced as per guideline and successfully cleared my CFP Exam 5 with a "B" grade.

16) Saket Jain-Mumbai (09867411087)-Mumbai-Passed in month of Sept.'12 (Attended TW/S Aug.'12)

I am saket jain,i had enrolled in a self study mode and clear all the four exams but when i reached in fifth exam,i found it very difficult because i didnt knw the right method and timeline approach.but when i joned keyur sir's workshop i found a huge gap in my understanding.In classes i learnt four step process,problem analysing tricks and timeline approach which helped me a lot.After finishing workshop, keyur sir also helped me through emails and special query session which helped me alot.I successfully passed the fifth exam in first attempt on 24 september.once again i would like to thank Keyur sir.

15) I am Sanam Desai (9867313259), fresh commerce graduate and pursuing CA final. I had enrolled CFP in Self study regular pathway and completed four modules in one year. I attended FINAL/EXAM 5 but only scored 26% and then I approached to Keyur Sir and attended his FAST TRACK CFP EXAM 5 training workshop in Aug.'12. First time, I learned the right method (Four Step approach) of calculating Goal corpus and finding Investment required and also learned the scientific way to approach the exam and most imp Do & Don't. Keyur Sir had regularly provided post training supports through phone/mail/classroom query handling till I successfully passed the EXAM 5 WITH B GRADE.

14)

If you are Regular|Self Study pathway candidate and attend FAST TRACK CFP Exam 5|AFP preparation Training Workshop now and does post training preparation as per our guideline... It will surely help you successfully pass your's Module exams with good grades. You may speak to a few of our FAST TRACK participants who have successfully passed their Module exams with good grades.

+919619640950- Mr. Aditya, (Passed Investment planning with B grade and Tax planning)-Metlife (ZTM)

+919223440013-Mr. Anil (Passed Retirement planning with B Grade)- Advisor- LIC
09833343021-Mr.Mohish (Passed Tax planning & Estate planning with B Grade)- IFA

- 13) Meera Mehta
- 12) Shruti Gupta
- 11) Rajeew Gupta
- 10) Biju Behnan
- 09) Mr. Nilesh Shukla, SBI
- 08) Mr. Manoj Kalaria, SBI
- 07) Mr. Devendra Sharma, SBI
- 06) Jatin Maniyar, IFA Jamnagar
- 05) Bhavin Sardar, IFA Jamnagar
- 04) Alpa Maniyar, IFA Jamnagar

03) Mr. Prithvi Potta, Associate Director- TrustPlutus Wealth Managers, Hyderabad (09885330546)-Passed CFP Exam 5 @ 1st attempt post training workshop dated 11th March'13 (Attended 22nd Batch in Bangalore_Jan.13)

02) Ms. Nidhi Manchanda, B. Com. Fresher- Attended our 24th Batch_Mumbai_Feb.13 (09833559603)-Passed CFP Exam 5 @ 1st attempt with the "B" Grade post training workshop dated 19th March'13.

01) Mr. Noble Paul, VP & Branch Head, Axis Bank-Kochi (08086000811)-Attended our 23rd Batch_Kochi_Jan.'13- Passed CFP Exam 5 @ 1st Attempt with the "B" Grade post training Workshop.

Dear Mr. Keyur Shah,

I am indeed delighted to inform that I cleared the CFP with a B Grade.

I was initially thinking about whether to take the exam now or in April. But , I had a certain confidence in me which prompted me to take the decision of going ahead in March itself. I must state that this confidence came to me only after the intense and exam-oriented training session that I had through your sessions. The methodology of teaching was very very useful and essential , especially the process advocated by you for solving each and every problem. Thanks a ton, Keyurji. The Financial Calculator was a revelation to most of us , without which I do not think the exam and calculations would have been this effortless.And thanks a lot Keyur for helping me clear my doubts even at odd hours of the day or even at night time. This was a tremendous support especially towards the last week. I must also mention about the support given by the CFP training colleagues Mr. Ranjith , Mr. Rajesh Kuttikkatt and also Mr. Maxie .And of course , the hard work put by me made all the difference in the ultimate analysis.

Participants' feedback about Training workshop

- 1) Dr. Nirakar Pradhan, Chief Investment Officer-Furture Generali Insurance- "Short & Effective deliberations of entire range of CFP concepts. Overall This is an excellent interactive learning experience"-Attended workshop in month of June'12
- 2) Mr. Sriram Iyer- Director (Sales)-Religare Macquarie Pvt. Wealth Management- Covered all key topics with adequate focus and Case Study Methodology.-Attended in month of June'12.
- 3) Mr.Rohit Misra- Branch Manager- HDFC MF-Jalgon- "Very Very Focused approach on CFP exam 5 only and practical tips for various issues"-Attended in month of June'12
- 4) Mr.Akhil Rai-Associate Vice President-Religare Macquarie-"Conceptual Clarity and Clarity of thoughts"
- 5) Mr.Birju Acharya, Established IFA, Patan, Gujarat-"Easy way of teaching and learned smoothly and excellent presentation skill"-attended in month of June'12 @ Ahmedabad.
- 6) Mr. Mohankumar-Training Manager-Religare Life, attended workshop in Bangalore in month of July'12 "Speed and Accurate Delivery of presentations"

- 7) **Mr.Venkatraman, Chief Financial Officer- City of London Telecom** "Well organized session by Mr.Keyur Shah and useful study material... Interactive session" Attended in month of July'12 @ Bangalore
- 8) **Mr. Raja, Cluster Head, Standard Chartered Bank Pvt. Wealth Management** "Mr.Keyur Shah was excellent and I came to know the methodology of solving case studies. Particularly apart from good knowledge of tax planning and investment planning.
- 9) **Mr. K Srinivas Rao-IFA and Trainer- Vijayawada-**"Well organized, systematic and lucid presentation", "Structured Approach, practical inclination and demystification of FP concepts in simple language" Attended in Oct.'12 @ Vijayawada.
- 10) **Mr. Nagraju-Cluster Head-ICICI MF, Vijayawada-**"To identify the concepts and draw a timeline and follows steps to solve the problems"-attended in Vijayawada in Oct.'12
- 11) **Mr.AC.V Sumanbabu- Branch Head- HDFC MF, Vijayawada-**"Complete clarity towards CFP in 3 days training...Approach and explanation and style of training was excellent"
- 12) **Mr.K.Seenivasan-ICICI Bank-**Learned the right methods for case studies solutions and now I am confident to pass the final exam with A grade"- Attended in Chennai Sept.'12
- 13) **Mr. Biju Kurville- Senior Vice President-Centum Private Wealth Management-**"This training session gave a different perspective and certain "Inside Scoop" with a clear focus on cleaning a test." -Attended in Chennai Sept.'12
- 14) **Mr. C.R.Manoj-Senior Manager-UTI MF-**"Systematic approach, basic concepts on time line taught in a simple way" Attended in Chennai sept.'12
- 15) **Mr.Naresh Panjanani-Established IFA and stock broking professional-**"A very structured way of approaching the CFP Exam, Clarity of concepts, focus teaching and A small concentrated group with personal attention for each participant" attended workshop in Sept.'12 at Mumbai.
- 16) **Ms. Chitra Ramesh-Manager-UTI MF-Mumbai-**"The workshop was very interesting and I have learnt many new concepts and also use of a financial calculator, Study material provided is an excellent quality and presentation was also excellent" attended in Sept'12 in Mumbai.
- 17) **Priya Shah-CFP Aspirant-Fresher-**"As I got my basic concepts crystal clear and learned the right techniques to solve the goal corpus calculation and finding SIP." Attended in sept.'12 at Mumbai.
- 18) **Mr.KK Verma-Chief Manager-UCO Bank-Kolkata-**"The Exam preparation strategies ultimately are directed at holistic professional development." Attended in Aug.'12 at Kolkata
- 19) **Mr.Ujjawal Chakraborty-Branch Manager-UTI MF-Dhanbad-**"There are many take away from this session. Especially the way Mr.Shah has taken Subject in his own style has added much value. The process and the clarity of thoughts of Mr.shah was amazing. He has been able to create the confidence in me that I shall pass the exam" attended in Aug.'12 at Kolkata.
- 20) **Mr.Aditya Kanoria-Regional Manager-Future Capital, Kolkata-**"The approach was very good, the way of explaining the concepts was very good." Attended in Aug.'12 in Kolkata.
- 21) **Mr.Raju Das-Senior Manager-State Bank of India-Kolkata** "Finding very helpful in understanding the concept, the right approach to face challenge pathway Exam 5. The basis and know how of how to figure the solution of the problems are clear. The confidence of the Trainer and building up the same of the participants was great" attended in Aug'12 at Kolkata.
- 22) **Mr.Naresh Baid, Established Independent Wealth Planner-Kolkata** "Learn the Do & Don't, Very Informative and exhaustive, through knowledge about logic and theory...Liked Steps and approach to solve the case studies" attended in Kolkata Aug.'12
- 23) **Mr.Manoj Belgaonkar- General Manager-Siemens India-Mumbai-**"In Depth Coverage of key concepts, Practical application of concepts then examples"
- 24) **Mr. Sandeep Gandhi- Established IFA- Rajkot-**"Very Methodological, To the Point, Concept clarity"attended at Mumbai in month of July'12
- 25) **Mr. Aditya Lakshman-Training Manager-Metlife Insurance-** Excellent hold on content and knowledge of facilitator" attended in month of July'12 in Mumbai.