

151+ Success Stories

Happy to share 151st Success story of our The CFP Aspirant Club (India)

Many many congratulations to Ms. Digisha Jobanputra, Fresher, Mumbai successfully passed her CFP (CERTIFIED FINANCIAL PLANNER) Final/Exam 5 @ 1st attempt post our 5th Weekend Batch June-July'14 dated 31/7/14.

Happy to share 151st Success story of our The CFP Aspirant Club (India)

Digisha Jobanputra <digishajobanputra@yahoo.in> Fri, Aug 1, 2014 at 10:55 PM

Reply-To: Digisha Jobanputra <digishajobanputra@yahoo.in>

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

Dear Keyur Sir,

I am happy to share with you my success in CFP exam 5. I cracked it after getting trained by you. Though I had very limited time, but all thanks to you that you gave personal attention and found out my weak points. I thought it was impossible for me to clear this exam as the FPSB has raised their bar tremendously. **But after meeting you and attending your training it wasn't the same any longer. You cleared all my concepts and basics which helped me a lot throughout my journey. Your study material was more than enough for all the exams.**

I would like to owe my success to your training and post training guidance. I would just sum it up by saying that if 1 does all that Keyur Sir says & follow him religiously then success will definitely knock your door. Thank you for everything, I am very grateful to have a coach like you.

Regards,

Digisha Jobanputra.

+91-9920445809

150th Success Story:

Mr. Anubhav Agarwal, Sr. Software Developer in Hyderabad Successfully completed his CFP through video learning kit in Regular pathway in 4 months. He enrolled in May14 and passed all 5 Exams @ 1st attempt with a "B" Grade.

(Cell no. 09505234236, Mail id: anubhavit@gmail.com)

149th Success Story:

Mr. Brijesh Madhusudan, Sr. Banker in Chennai enrolled in Video Learning Kit (May14) & successfully passed four modules exams @ 1st Attempt with a "B" grade and aim to pass Exam 5/Final Exam by Aug.'14.

(Cell 09884010247, Mail Id: brijeshmadhusudan@gmail.com)

148th Success Story:

Mr. Ashish Pandey, Sr. Manager, Lucknow working with ISec successfully completed 1st 2 exams with Video learning kit and aim to complete balance 3 exams by September'14

(Cell no.8756961068, dheer@sify.com)

147th Success Story:

Mr. Srinivas Rao Kasinathuni, Sr. Independent Financial Adviser, Vijayawada, attended our 15th Fast Track CFP Training workshop in 10/12 and successfully completed his CFP in challenge pathway in May'14 @ 1st attempt.

(Cell no. 09848889490, Mail id: sraokasi@gmail.com)

146th Success Story:

Mr. Suman Babu, Branch Manager, HDFC MF, Vijayawada, attended our 15th Fast Track CFP Training workshop in 10/12 and successfully completed his CFP in challenge pathway in May'14 @ 1st attempt with a "B" Grade.

(Cell no. 07702212383, Mail Id: sumanacvbabu@gmail.com)

145th Success Story:

Mrs. Renu Dhavan, IFA, Mumbai, attended our 16th Batch in Oct.'12 and successfully completed her CFP Exam 5/Final.

144th Success Story:

Mr. Apurva Mehta, Associate Director, TrustPlutus Wealth Manager, Surat, Attended our 20th Batch in Ahmedabad and successfully completed his CFP in Challenge pathway. (Cell no. 09825500184, Mail: Apurva.Mehta@trustplutus.com)

143rd Success Story:

Mr. Srinivas-Hyderabad (09701956446)- Joined in Video Learning & successfully passed RPEP & IP exams and aim to complete CFP by Dec.14

142nd Success Story:

Mr. Ramesh Kumar, Sr. Vice President, MCX, Hyderabad attended our 42nd batch in May14 and successfully passed 1st module exam Investment Planning @ 1st attempt with a "B" Grade and aim to complete CFP by Dec.14.

(Cell no.09642704619, Mail: varakhedkar@gmail.com)

Happy to share the 141st Success Story of our Video Learning Kit... Jay Joshi, Fresher, Mumbai successfully passed his CFP Exam 5/Final @ 1st attempt with the "A" Grade dated 1st July'14.

Jay Joshi <jayjoshi93@yahoo.com> Wed, Jul 2, 2014 at 3:41 PM

To: Keyur Shah <keyur.shah1975@gmail.com>

Dear Sir,

Thanks for all your support and guidance, the video learning kit was really awesome which cleared the majority of my doubts and the five step process, not only helped in this exam but will also help me further in my higher studies thanks for it sir.

Initially I wasn't able to clear the exam, but due to your training, guidance I not only cleared it but passed with "A" grade.

Your video learning kit was really awesome and the way you guided me through d entire process was indeed superb, The question bank with a handwritten solution which you have prepared is really very nice and post training supports (query handling/Mock tests) gave me a good domain expertise.

All I will once again say you is thanks a ton sir.

Regards,

Jay Joshi,

09930558595

140th Success Story: Kamal Deep Singh, Regional Training Manager, Reliance Life Insurance, Delhi-Successfully completed Investment Planning & Exam 5/Final with the help of Video Learning Kit. (Cell no. 09999983980, Mail id: whales29@rediffmail.com)

"Investing for the fast track CFP course is definitely VALUE INVESTING... Once again thank you so much Sir and HAT'S OFF TO YOU."... **Happy to share the 139th Success Story of our Video Learning Participant Ms. Vaishali Kale, MBA (Finance) Senior Partner with a leading CA firm in Mumbai.**

Vaishali Kale <kale.vaishali@yahoo.in> Tue, Jun 17, 2014 at 4:18 PM
Reply-To: Vaishali Kale <kale.vaishali@yahoo.in>
To: Keyur Shah CFP <keyurcfp@thecfpaspirantclubindia.com>

Dear Keyur Sir,

I am glad to share that I've cleared my two modules at the first attempt in a 15 - 20 days time.

Sir, this was not possible without your support and guidance. As I'd already enrolled myself and also completed my course with one of the reputed educational providers. I was very much confident about my exam that I would definitely clear my exams with good grades.

But I didn't clear my first exam. I was shaken and shocked too. That time somehow it clicked me to contact to Keyur Sir. The situation was very crucial as I had already enrolled for the exams and was with very short time. I was not confident, whether I'll be able to clear my remaining modules in first attempt. But the pathway Sir has built to achieve CFP^{CM} Certification is so solid that one has to trust Sir and follow the road map and you're there "With you Certificate". I did the same thing. There were 3 exams remaining and wanted to clear with good grades.

So, I enrolled myself for Video Learning Kit. I feel there is no difference whether you are in a classroom or in front of your PC. For me it was a classroom training only. The way Sir has explained each and every concept, mainly 5 step process and Universal Steps are amazing. Asset allocation and portfolio re-balancing strategy very well explained. It is not just exam oriented, but more of practical approach. The course is designed with proper planning and of course result oriented strategy. Study material and handwritten solutions are very much helpful.

Investing for the fast track course is definitely "VALUE INVESTING". Once again thank you so much Sir and HAT'S OFF TO YOU.

Thanks & Regards,
Vaishali Kale
9870260192

138th Success Story: Mr. Kalyan, BFSI Professional in Delhi successfully completed his CFP exam 5/Final with the help of Fast Track CFP Training Workshop. (Cell no. 08800233332, kay.0246@gmail.com)

Happy to share the 137th Success Story of our Fast Track CFP:

Mr. Ashish Mumbaiwala, Senior BFSI Professional, currently working as an Independent Share broker, Real Estate & Financial Advisor (Ex. Regional Manager,

Reliance Life Insurance) based in Ahmedabad... Attended our 31st batch Fast Track CFP batch & successfully completed his Exam 3 (Investment Planning), Exam 4 (Tax Planning & Estate Planning) and Exam 5 (Advance Financial Planning) @ 1st attempt with a First Class ("B" Grade) in May'14.

Ashish Mumbaiwala - CFP Passed with a First Class ("B" Grade) in First attempt.

Ashish Mumbaiwala Ashish <aish_sap@yahoo.com> Tue, May 20, 2014 at 12:01 PM

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

Dear Keyurbhai,

Thank you very much, for giving such knowledge of financial planning.

Your given Training & Study material really works a lot for IP, TPEP & AFP exams.

I have attended your 31st batch since last long, although, I passed my final exam with you after training support.

I must say here, that your given question and solution, are just like, Imp from lot many twist question for AFP.

With your advice on "How to attend exam?" I covered almost 40% marks in the very first hour by attending 2 marks and 3 marks question first. After that, my confidence level was very high. So, I appeared all 30 questions and passed @ 1st attempt with a first class (B Grade)

Thanks again, for educational and moral support.

Regards,

Ashish Mumbaiwala

9099556500

136th Success Story of our Video Learning Kit Fast Track CFP Training Workshop.

Riha Agarwal-Kolkata, fresh Graduate – Completed successfully CFP in Regular Pathway (all 5 Exams)

She has enrolled "Double Sure Fast Track CFP" Training Workshop-Attended both Video Learning & Class Room Training workshop in our 30th Batch in Kolkata dated 17th to 19th May'13. She was unsuccessful twice in her first module exam (Retirement planning in March'13) before enrollment. She has

cleared her 1st module exam Retirement planning @ 1st attempt post workshop on 4th June'13 and 5th Exam AFP/Final in March14.

Riha Agarwal <rihaagarwal@gmail.com> Wed, Apr 2, 2014 at 11:06 PM

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

Dear Sir,

I am glad to share that I have cleared my final module at first attempt which would not have been possible without switching over to your training program.

Keyur sir has provided latest and updated study material which was very helpful and specially prepared from the exam point of view .The question bank and scan hand written solutions were best to help to clear concepts.

Apart from the study material he has given the right process this is for all those keep on calling and asking to mail them the study material as sir shared my contact info earlier after i have cleared my module exam.

One may get his CFP study material on borrowed basis but not the techniques & supports of expert coach which are equally essential for building knowledge and exams.

For all the queries sir has always been easily accessible either through phone or mail away neither he ended his work by providing the training even after that throughout the session he has kept mailing all the important questions and changes made.

Above is a huge difference between him and other education partners.

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 Expert Coach & EP.

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.

Thanks for all your support.

Regards

Riha Agarwal

9163068499, rihaagarwal@gmail.com

Happy to share the 135th Success Story of our Fast Track CFP Training Workshop... Mr. Sanjay Tawde, Senior BFSI Professional (Ex. Senior Training Manager- Max Life Insurance Mumbai, Enrolled in our 38th Batch in Dec.13 and Successfully completed his CERTIFIED FINANCIAL PLANNER certification in March14 @ 1st attempt.

Thank you from the bottom of my heart

Sanjay tanwade <tsanjay3@yahoo.co.in> Sat, Mar 15, 2014 at 9:29 AM

Reply-To: Sanjay tanwade <tsanjay3@yahoo.co.in>

To: Keyur CFP <keyurcfp@thecfpaspirantclubindia.com>

Dear Keyur Sir,

I am glad to inform you that I have cleared my CFP through challenge pathway.

Clearing CFP through challenge pathway was actually a challenge, the reason been candidate need to be clear about Tax, Insurance, Retirement, goal base calculations and Investment to attend the challenge pathway.

However, you made it so much possible through your systematic training structure and post training support that I could clear the Exam in first attempt in just two months time. I feel without your training it would have taken me more than six months.

Thanks for saving my time and efforts your training is worth attending.

All the best for your journey of creating CFP Certificants.

Regards,

Sanjay Tawde

09820777478

134th Success Story: Ms.Needhi Shah, Junior BFSI Professional works with an Ifast Solution, Mumbai, She was unsuccessful in 1st attempt (Exam 5/Final) in Feb.14 and she already booked her 2nd attempt on 10th March...Later on she had contacted us in Feb end and started her Video Learning 1st March14 and she successfully completed her CFP Exam 5/Final @ 1st attempt with a "B" grade post Video Learning Training Workshop on dates 10th March14.

Subject: Ma Guru Dakshina

From: Nidhi Jakharia <nidhijakharia@yahoo.com> on Sat, 15 Mar 2014 13:24:25

To: Keyur Shah <keyur1975@rediffmail.com>

Dear Sir,

I am Happy to share with you my success in CFP exam 5. I have cleared the paper after getting trained by you. Though I had a very limited time all thanks to you that i could clear it in 1 shot after getting trained by you.

I would like to owe my success to your simple training and guidance. I need to acknowledge the Tips given by you in the video learning. It helped me a lot and could successfully score B grade by studying in 10 days.

Thank you for your guidance.

Best Wishes,

Nidhi Shah

09664716351

133+ Success Stories of our Video Learning Kit & Classroom Fast Track CFP Training Workshop:

133rd Success Story: Mr. Sumit Prabhakar, Senior Manager- UTI MF, Chandigarh, Enrolled in CFP Regular pathway and was unsuccessful 3 times in 1st Module Exam (RAIP) till Aug'13. Later on He enrolled in our Video Learning Kit and successfully completed all (4) Module exams @ 1st attempt with a "B" Grade (60%+) and Exam 5/Final @ 1st attempt with a "B" Grade in Feb.14.

Passing Module & Final Exam (All 5 exams)- CFP in Regular Pathway

CFP in Regular Pathway (All Modules/Final Exams) successfully completed with our Video Learning Kit @ 1st attempt with a "B" Grade.

Sumit Prabhakar <sumitprabhakar1977@gmail.com> Sat, Mar 1, 2014 at 3:04 PM

To: keyurShah1975@gmail.com, keyur1975@rediffmail.com

Dear Sir,

Much Happy to inform you that I have successfully passed FPSB Four Modules & Final Paper successfully. I was able to clear all the papers in first attempts. Cleared papers in less two months time.

I started with first exam Dec End and passed final one on 24th Feb. Thanks you for the support and guidance with which only I was able to clear the papers first attempt & faster than I could have imagined earlier... Before training I was not confident/able to solve the questions as basic logic's were not clear...Got stuck up with the first module paper (RAIP) for three times and was thinking to stop pursuing the course further. But luckily I got to know of your Video Learning DVD training with which I was able to pursue studies at home on evenings and morning without taking leave.

The Training definitely changed my thought process after going through training sessions I was able understand/Logic of Inflation adjusted Corpus/SIP calculation & became confident of solving any kind of Corpus/SIP calculations.

Moreover, your support in regard to queries was promptly there on the phone whenever required. Also general discussion within workshop also helped in understanding practical points like fair value of real estate, PPF etc.

Though before the start of the Training Workshop I was always wondering how one could pass Module Papers when Training was revolving more around Final exam. But today I can vouch that anyone who goes through the five day workshop diligently will be able to easily pass the Modules as well as Final Paper with Good Grades

I am sure that for any grade student Study DVD Training is more than enough to pass with the "A" grade. I will be more than happy to answer any queries or value added to any new participants who has any doubts/concern.

Thanks again for your continuous support.

Yours sincerely,

Sumit Prabhakar

M-9779009973

132nd Success Story: Mr. Hemang Bhatt, Sr. Independent Financial Advisor , Valsad-Gujarat. Enrolled in Video Learning Kit in Oct.13 and successfully completed his CFP in Challenge Pathway @ 1st attempt in Feb.14

Testimonial

Hemang <hemang.u.bhatt@gmail.com>

Sat, Mar 1, 2014 at 1:47 PM

To: Keyur Shah CFP <keyur.shah@thecfpaspirantclubindia.com>

Cc: "hemang.u.bhatt@gmail.com" <hemang.u.bhatt@gmail.com>

Dear Keyurbhai

I have passed the CFP exam 5 on 27/02/2014 @ 1st attempt...Keyurbhai, your video learning kit n ur study material r so good that they help me a lot to pass the exam..... Post training support of urs is also "KABIL- E- TARIF"whenever i had called u, u have solved my queries.... Anybody who join u will pass the exam esily that is for sure..... Thank u very much Keyurbhai for ur support n guidance

Regards
Hemang Bhatt

Sent from my iPhone

131st Success Story: Mr. Senthil Rajan, Australia, Ex-Regional Head of a leading Pvt. Sector Bank (Chennai) and now in Australia... attended our 28th Batch Fast Track CFP Training workshop in Hyderabad in May13 and successfully completed his CFP in Challenge pathway @ 1st Attempt in Feb.14.

Thank You

SENTHIL RAJAN C <cсенraj@yahoo.com> Thu, Feb 13, 2014 at 4:32 AM

Reply-To: SENTHIL RAJAN C <cсенraj@yahoo.com>

To: keyur.shah1975@gmail.com, keyur.shah@thecfpaspirantclubindia.com

Dear Keyur,

I am Happy to share with you my success in CFP exam 5. I have cleared the exam on my First attempt after getting trained by you Keyur. I would like to owe my success to your simple training and guidance.

I need to acknowledge the Tips given by you on the previous day of exam. Even though I attended the training in May 2013 you were always willing to guide me even in Feb 2014.

I am feeling lucky that I had the opportunity of attending your training.

Happy to inform that I have landed in Australia on Tuesday 11th Feb.

Best wishes to you....

Rgds

Senthil Rajan

0061 469552012

Sent from Yahoo! Mail for Windows 8

130th Success Story: Mrs. Monica Mansukhani, Senior Insurance Professional (Ex. COO of a leading firm) based in Bangalore. Enrolled in our Video Learning Kit in Nov.13 and successfully completed her CFP in Challenge Pathway Exam 5/Final @ 1st Attempt with a "B" Grade in Jan.14.

Monica Mansukhani <mansukhanim@yahoo.com> Tue, Feb 4, 2014 at 12:34 PM

To: <keyurcfp@thecfpaspirantclubindia.com>

Hi Keyur,

Thank you so much for your excellent and crisp training techniques which helped me to pass the exam with a B Grade in the first attempt! With not much studying time in the last week before the exam, I was only relying on the methods taught by you on goal setting and the rules provided by you to take me through the exam....and it really helped!

One of the most significant things that I have learnt is the use of the financial calculator. Initially, I was not sure if I could learn this through video learning, but truly, all through the video learning, I never ever felt that I was not present in a classroom environment!

I am now in the process of preparing my financial plan and will need your guidance after I complete it. I will appreciate if I can get your support on this.

Once again, thanks for all your support.

Regards

Monica

09342536347/080-41664060

129th Success Story: Mr. Kiran Hake, Senior Insurance Professional, Mumbai (Ex. Chief Manager, Birla Sun life Insurance) and current working as Sr. Partner in a leading firm.

KIRAN HAKE <kiranhake@yahoo.co.in> Fri, Jan 31, 2014 at 6:28 PM

Reply-To: KIRAN HAKE <kiranhake@yahoo.co.in>

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

Cc: Kiran Hake <kiranhake@yahoo.co.in>

Dear Keyur Sir,

Yesterday I cleared the CFP Module 5 examination and now I am qualified to get SEBI license to conduct financial planning practice. As I told you earlier, I could able to study only for 15-18 days prior to exam since I was engaged your valuable guidance and feedback in helping me clear my exams. Especially the 5 step process to approach the questions, the mock-test environment to know the strengths and weakness and finally a specific exam ordinated approach & guidance one day prior to the exam was very much useful.

The hypothetical sections of question paper (i.e. Sec 1: 2 marks, Sec 2: 3 marks, Sec 3: 4/ 5 marks) help me in managing the time during the exam to attempt maximum number of questions.

Thanks a lot for your help.

Regards,

Kiran Hake

(M): 09819004029

128th Success Story: Ms. Vinita Idnani, Partner, Capital League, Gurgoan- Enrolled in our Video Learning Kit dated 15th Jan.14 and successfully passed CFP Exam 5/Final @ 1st attempt in 30th Jan.14

Thank you

Vinita Idnani <vinita@capitalleague.biz> Thu, Feb 6, 2014 at 7:09 PM

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

Dear Keyur

Thank you very much for your support in helping me clear the CFP Module 5 exam in a span of 2 weeks!! The speed with which you reacted and immediately sent me the video learning kit is commendable.

The course content for the video learning kit has been very well put together and the training and question bank comprehensively cover the entire syllabus.

I found the 3 day training video particularly useful. It covers the entire syllabus, is interesting and is great for working professionals who can go through it at their convenience and pick and choose the topics as well. You have definitely made it much easier for all CFP aspirants to complete this course.

Regards

Vinita Idnani

Partner

Capital League

GL-502, DLF Cross Point I DLF City Phase IV Gurgaon – 122002, Haryana

Tel: +91-124-4062349, 4148539 I Telefax: +91-124-4072350

Mobile: +91-98111 1226 I Website: www.capitalleague.biz

Best Performing Individual Financial Advisor Award (National), 2012-13

Best Performing Individual Financial Advisor Award (Mega Cities - North), 2012-13

127th Success Story: Mr. Ismail Shaikh, Senior Banking Professional, Mumbai. Enrolled in our 36th Batch Oct.13 and successfully completed his CFP Exam 5/Final @ 1st attempt in the Challenge pathway in Jan.14.

A word of thanks.

Ismail Shaikh <i4smile@yahoo.co.uk> Sat, Feb 1, 2014 at 10:28 AM

Reply-To: Ismail Shaikh <i4smile@yahoo.co.uk>

To: "keyur1975@rediffmail.com"

<keyur.shah1975@gmail.com>

Cc: Ismail_red <i4smile@rediffmail.com>

Dear Mr. Shah,

It takes pleasure to inform you that I have cleared CFP through challenge status in my first attempt and take this opportunity to thank you for providing your valuable guidance and support as and when required over the phone or meeting personally after 4 days training sessions which helped me a lot in clearing concepts & problems.

I give my best wishes to all the participants of your batches for their success in coming days.

Regards,

Mohd. Ismail Shaikh, B.Com, GDCA, PGDFA, CFP^CM

126th Success Story: Ms. Rikita Shah, Fresher, Mumbai. Attended our 36th Batch in Oct.13 and successfully completed her CFP Exam 5/Final @ 1st attempt in Jan.14.
09833417244, rikita.shah31@gmail.com

Success Story.

Rikita Shah <rikita.shah31@gmail.com> Thu, Feb 27, 2014 at 10:57 AM
To: Keyur Shah CFP <keyur.shah1975@gmail.com>

Dear Keyur Sir,

I am glad to inform you that I have been able to clear my final module of CFP in first attempt with a C grade. This would not have been possible without your continuous post training help and guidance. By attending fast track training most of my financial concepts were cleared and the remaining were cleared in post training sessions.

The key to clearing CFP final in first attempt is following the steps and guidelines given by Keyur Sir and having faith in your hard work.

Hereby I sincerely thank you for all the help and support provided by you for clearing my CFP final module .

Regards,

Rikita Shah

126th Success Story: Ms. Rikita Shah, Fresher, Mumbai- Attended our 36th batch in Oct.13 and successfully completed her CFP exam 5/Final @ 1st attempt in Jan.14 (09833417244)

125th Success Story: Mr. Girish Khandelwal, A young Independent Financial Planner based in Chennai attended our 22nd Batch in Bangalore Jan.14 and later on also enrolled in Video Learning Kit in Sept.13...Successfully completed his CFP in Challenge pathway in Jan.14.

Cleared CFP Examination 5 today 28/01/2014

girish kumar <giribhai_888@yahoo.com> Thu, Feb 6, 2014 at 1:27 PM

Reply-To: girish kumar <giribhai_888@yahoo.com>

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

Dear Sir,

First of all I would like to thank you for your great efforts to guide and motivate me to clear CFP Examination. I would like to share some of my learning which helped me during the examination and as well as in my Profession.

Exam point of view:

1. Always-think that you are not writing the exam, you are making a financial plan for your client.
2. Following 5 step process and drawing a Timeline. This helped me understand a lengthy paragraph question too simple one.
3. The best part is a video learning kit and handwritten notes.. when ever I get a doubts I can go back to video and clear the doubts.
4. Last 10 days, mock test preparation is very crucial practice

Professional Practice Point of view...

- 1) Mutual fund AUM increased to 1cr within 7 months
- 2) 25 Fee based Financial Planning report prepared during my 9 months of preparation for the Exam.

Earlier I use to follow up the clients many times, But now they are calling me for all the needs regards to personal finance. The view of the client changed from seller to Professional Advisor.

The overall experience and learning's from you has become a Boon for me..... Thank's a lot. Will be in touch with you in my financial journey of Life.

Regards.

Girish Khandelwal MBA,CFP.,

Chief Financial Planner

Future Investments Securities & Services

Website: www.fiss.co.in/ Mail: enquiry@fiss.co.in

09884766601

124th Success Story: Mr. Rayudu Peddi, Sr. Equity Analyst-Hyderabad, Enrolled in our Video Learning Kit in Dec.13 and successfully passed his CFP Exam 5/Final @ 1st attempt with a "B" Grade in Jan.14

THANK YOU VERY MUCH SIR..

rayudu peddi <2peddi@gmail.com> Thu, Jan 30, 2014 at 12:13 AM

To: keyurcfp@thecfpaspirantclubindia.com

Dear Keyur Sir,

I have cleared the final exam of CFP in first attempt on 28th January 2014 with B grade.

Thank you for your support and guidance in clearing the final exam. Your video learning kit has helped me a lot to clear the final exam.Thanks to your tips and techniques to approach the final module which enabled me to clear the exam.

The case studies and the stepwise solutions which you have provided are really excellent. The five step process is very much useful for solving the case study easily.

I highly recommend your video learning kit to CFP aspirants because one can repeat the video again and again until we understand the certain topic.

Thank you once again for your support

Regards,

Rayudu Peddi
9701007744

123rd Success Story: Ms. Vidhi Shukla, Fresher, Mumbai, Attended in our 36th Batch Oct.13 and successfully passed her CFP Exam 5/Final @ 1st attempt with a "B" in Jan.14 (09967262598)

Vidhi Shukla <shuklavidhi@yahoo.in> Mon, Jan 27, 2014 at 3:08 PM
Reply-To: Vidhi Shukla <shuklavidhi@yahoo.in>
To: Keyur Shah CFP <keyurcfp@thecfpaspirantclubindia.com>

Dear sir,

Thank you sir for your support and time, which helped me to clear final module exam with B-grade @ 1st attempt. Without your guidance it was not possible to clear at one shot.

I attended the batch in October for 4 days, classroom training clear the concepts and after classes, sir has always solve the query whenever we call him.

The question banks prepared by sir is awesome.

Thank you for your support and patience.

Regards
Vidhi Shukla

122nd Success Story: Mr. Abraham Josheph, Senior Independent Financial Advisor, Kochi, Enrolled in our 23rd Batch in Kochi Jan.13 and successfully completed his CFP @ 1st Attempt with a "B" Grade in Aug.13. (09847050776, abyjosheph11@gmail.com)

121st Success Story of our Video Learning Kit: A Youngest Participant of Our CFP Aspirant Club, Ms. Aishwarya Surana-Guwahati-Assam-Studying in a 1st year B.Com (09864806108)-Attended both Video Learning & Classroom (30th batch Kolkata in month of May'13)-Successfully passed her all 4 Module Exams @ 1st attempt with a "B"

Grade in last six months and aims to complete her CFP Exam 5/Final by March'14.

Aishwarya manoj surana <manoj suranaght@gmail.com> Wed, Jan 22, 2014 at 10:29 AM

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

Dear keyur sir,

First of all I am very grateful to you for providing me the help whenever I asked for. I had attempted for the RAIP module once but could not pass it before joining your workshop as well as video learning kit.

Today, I am happy to share that I have cleared my all 4 module exams RAIP, RPEP, IP & TPEP successfully with a "B" grade@ 1st attempt in last six months.

The study material which you have provided is exhaustive and very much sufficient. The five step process is a great technique for solving the sum in the stipulated time period. Also the usage of p/y and c/y is great...Which you taught us during the video learning as well in classroom training workshop.

The financial calculator makes it easier to solve the sums. Your guidance was also a great help in the post training preparation. Last but not the least, THANK YOU for all your support and the help that you provided without which i would not have been able to pass my exam with such a good grade.

Regards,
Aishwarya surana.

"You are truly the best coach and trainer for CFP"...120th Success Story of our Video Learning Kit: Feedback about our Video Learning Kit: Mr. Paresh Swain, Regional Training Manager- SBI Life Insurance, Chennai. He has successfully completed his CFP in challenge pathway @ 1st attempt with a "B" Grade on 20th Jan.2014.

Paresh Swain <paresh.swain@gmail.com> Tue, Oct 29, 2013 at 11:36 AM

To: Keyur Shah <keyur.shah1975@gmail.com>

Dear Keyur,

Greetings of the day!

First and foremost thank you for being able to package it so nicely and could touch base with wide variety of concepts and solutions.

- Your 5 step process is definitely a great game changer.
- The principles shared are amazingly practical and simple.
- Language used is simple and you have tremendous amount of patience and your ability of understanding where someone could get struck is something to look forward to.
- The ease at which you comprehend a case and through timeline you solve the cases is something many of us have to master on.
- After completing the last video I felt I wish I could have attended your live class.

Regards,

Paresh Swain (09940022062,09962499233)

119th Success Story: Ms. Nidhi Manchanda, B.Com fresher had attended our 24th Batch Training Workshop in Feb.13 Mumbai and completed her CFP Exam 5/Final in March13. She got her 1st Job immediately based on CFP with a MNC KPO as Financial Analyst.

We shared couple of openings post CFP all fresher/Requested participants and she got selected with Mid size Financial Planning firm and now working as Sr. Financial Planner.

Nidhi Manchanda <nidhimanchanda@yahoo.in> Thu, Oct 24, 2013 at 7:57 PM
To: Shah Keyur <shah.keyur@thecfpaspirantclubindia.com>, Keyur Shah CFP <keyurcfp@thecfpaspirantclubindia.com>

Dear

sir,

I would like to express my sincere gratitude to Keyur sir who guided me to become a CFP.

My experience at Keyur sir's fast track CFP training workshop was very

informative. During the workshop, in-depth clarity of concepts was given. Many features of the financial calculator were shown which I was not aware of earlier. The study material provided was very exhaustive, helpful and sufficient.

The handwritten solutions prepared by sir were very easy to understand.

At the end of the workshop, he asked me to decide the date on which I will be giving the CFP final exam to set a target.

He provided full support even after the workshop. I called him up several times and every time he helped to clear my doubts either on phone itself or by mailing the solution to the question.

With his post training support and guidance, I cleared the CFP final exam within one month of joining the workshop with grade B.

Also I got my first job on the basis of CFP soon after clearing the exam and he has also share couple of opening and I got selected with one mid size Financial Planning firm and now working as a Sr. Financial Planner.

I would recommend all the CFP aspirants to join Keyur shah's fast track CFP training workshop.

Regards,
Nidhi Manchanda, 09833559603
Sent from Yahoo! Mail on Android

Haapy to share 118th Success Story of our Fast Track CFP Training Workshop.- Mrs. Sangeeta Nair, FCA, Senior BFSI Professional, Mumbai Enrolled in our 37th Batch in Oct.'13 & successfully cleared his CFP Exam 5/Final @ 1st attempt with a "B" Grade (60%+) on 10th January'2014.

Sangeeta Hemant <sangeet81@gmail.com> Tue, Jan 14, 2014 at 10:06 AM

To: Keyur Shah CFP <KeyurCFP@thecfpaspirantclubindia.com>, Keyur1975@rediffmail.com

Dear sir

I am extremely happy to inform you that I have cleared CFP final exam in the first attempt with B grade.

This journey was made very easy only because of your extensive support, motivation and exhaustive coverage of the topic.

I am actually a student of an Educational Partner, but I am very sure that if I had only relied on them, this journey would not have been smooth.

I am very happy that as aspired by me, I am much more knowledgeable today with a better grip over the subject and passing had eventually become secondary.

Thanks a lot for helping me become a knowledgeable CFP and showing confidence in me whenever I felt short of it.

Best regards

Sangeeta Hemant, CA, CFP

9967060586

Haapy to share 117th Success Story of our Video Learning Kit CFP Fast Track CFP Training Workshop.- Mr. Rushabh Shah, Enrolled in our Video Learning Kit in Nov.13 & successfully cleared his CFP Exam 5/Final @ 1st attempt with a "B" Grade (60%+).

Rushabh Shah <rss310790@yahoo.in> Fri, Jan 10, 2014 at 7:23 PM

Reply-To: Rushabh Shah <rss310790@yahoo.in>
To: Keyur CFP <keyurcfp@thecfpaspirantclubindia.com>

Dear Keyur Sir,

I am very happy to inform you that with your perfect training and guidance for preparation, I am able to clear Exam - 5 with a "B" Grade "easily" @ 1st attempt.

I opted for video training and it was like a personal training from Keyur Sir. I never felt that i am not in classroom. Your magical and "Logical Five Step Process" of solving problem helped me a lot. In exam i found difficult problem very easy to solve with a "Five Step process."

Once again Thank you so much sir for helping me to achieve my dream.

Thanks for your support and well directed guidance.

I surely recommend my friends to join your training if they want to become CFP with a good knowledge and with good marks.

Regards

Rushabh Shah (9833601958) CFP , CA Final Student

116th Success Story of Our Video Learning Kit: Mr. Jatin Shah, Sr. Vice President, Way 2 Wealth Management, Mumbai enrolled in Video Learning in Oct.13 & Successfully completed his CFP Exam 5/Final with a "B" (60%+) Grade in Dec.'13.

Jatin Shah <jatshah@gmail.com> Thu, Dec 26, 2013 at 3:40 PM
To: Keyur Shah CFP <keyur.shah1975@gmail.com>

Dear Keyur Sir,

I am happy to inform that I have passed CFP Exam in B grade, thanks to your Video Learning Kit.

I cleared in 2nd attempt as I didn't complete the total practice hours and did hurry in giving exam, Mainly your five step process are accurate for solving questions .

Video learning kit is very help full for full time working people like us. Using video learning kit , we can clear our doubts and queries , if any again and again. It has helped me in clearing my doubt in advance financial planning calculation. Even your help and guidance during post training has helped a lot.

Thank you Sir,

Jatin shah, 09819007090

115th Success Story:

Dr. Nirakar Pradhan, Chief Investment Officer (CIO) -Future Generali Insurance, Mumbai enrolled in our Video Learning Kit (Aug.'13) & successfully completed his CFP in Challenge Pathway/Fast Track CFP in Dec.'13 @ 1st attempt with a "B" Grade 11th Dec.'13.-

Nirakar Pradhan <npradhan2@hotmail.com> Fri, Dec 13, 2013 at

6:14

AM

To: Keyur Shah <keyur.shah1975@gmail.com>

Dear

Sir,

I am happy to inform that I passed CFP Exam in B grade, thanks to your structured learning tips from Video lessons. Despite having a CFA charter, I failed in the 1st attempt as I didn't follow/ practice your step by step processes. The focus to learn basics of fundamental concepts how to use CMPD, AMRT and CASH functions immensely helped.

I may add here my exam experience. I forgot to carry my calculator and had to return to my residence. Thus, I was late to exam hall by about 30 minutes. I answered only 75 marks, couldn't have time for another 25 marks (5 questions carrying 5 marks each). Still I got B grade. This indicates I answered most questions correctly.

Video learning helps candidates how to relearn a concept again and again, wonderful advantage for a busy person (CIO of an insurance company) like me. This coupled with your assurance to clarify any post-training /video lessons instilled profound confidence in me.

I sincerely thank you for your most valuable inputs in my professional journey. I wish you all the best ahead.

Regards

Nirakar

114th Success Story:

Mr. Jagdish Chaudhri, Senior BFSI Sales Professional, Based in Ahmedabad completed his CFP in Challenge pathway. He had enrolled in 36th Batch Oct.'13 Mumbai & attended the special Training and completed his CFP with a "B"Grade in Nov.13 in just 45 Days.

Many Thanks-Cleared CFP with a "B" Grade

Jagdish <jagdish@jagdishchaudhari.com> Tue, Dec 17, 2013 at 1:38 AM

To: Keyur Shah <Keyur.shah1975@gmail.com>, Keyur Shah CFP
<keyurcfp@thecfpaspirantclubindia.com>

Dear Keyur,

I would like to thank you profusely for your mentoring, as without it it would have taken long to successfully clear CFP Challenge examination in B Grade in straight 6 weeks.

Also you are well aware that after flunking in 1st attempt I repeated after 2 weeks and result was far better than expected.

If I analyse difference was that 2nd time I tried to replicate exactly your all 5 steps and drawing the goals timeline more efficiently. Now I also understand why from day 1 your emphasis was following 5 steps, drawing correct timeline and not jumping directly to calculate outcome. Also whenever I called up you we're able to clarify my queries as soon as I threw question to you.

But more than all I would like to thank you for all your patience and motivation you provided.

I wish more and more people benefit from your efficient guidance and if required please provide my mail and number to anybody so I be a vetting point in one's learning journey in becoming a CFP.

Many thanks again

Jagdish Chaudhari

Sent from my iPhone

113th Success Story: Mrs. Kushal Dehekar- LIC/MF Advisor- Mumbai, (09833544705) Attended our 32nd Batch in June13 & completed her Exam 5/Final in Nov.13.

112th Success Story: Mr. Manuel Xavier, Senior BFSI Professional & IFA, based in Kochi, Enrolled in Video Learning Kit in Aug.'13 and Successfully Completed Investment Planning (Exam 3) & Final/Exam 5 in Nov.13.

Subject: Thank you for making me a CERTIFIED FINANCIAL PLANNER
From: Manuel Xavier <manuelxavier1978@hotmail.com> on Sun, 01 Dec 2013 10:13:48
To: Keyur Shah <keyur1975@rediffmail.com>

Dear Sir

A trillion thanks to you for making a proud CFP

This CFP will add more value to me especially because I am a person without having any qualification with finance background .I am only a BSc Science graduate with experience in finance industry .Only because of your video learning kit and valuable support and guidance I become a CFP now .Without your guidance, it is impossible for a person like me to clear the Exam 5 in first chance.

Thank you once again Sir...Thank you very Much for the support

Manuel Xavier

With Best Regards

Manuel Xavier CFP

Hand Phone +91 9895880576

111th Success Story of our Fast Track CFP Video Learning Kit:

Mr. Atul Gaikwad, Senior BFSI Professional_Trainer, based in Pune, Enrolled in Video Learning Kit (CFP-v3-50hrs) in Oct.13 & successfully completed Investment Planning (Exam3) & CFP Final_Exam5 @ 1st Attempt in Nov.13.

Atul Gaikwad <atul1271@rediffmail.com> Mon, Nov 25, 2013 at 4:41 PM

To: Keyur Shah <keyurcfp@thecfpaspirantclubindia.com>

Dear Keyurji,

I have cleared the Final_Exam5 of CFP in the first attempt on 19th Nov 2013. Thank you for your support and guidance in clearing the final exam.

Your video learning kit has helped me immensely not only to clear the final exam but also to the clear Investment Planning Module. I had never thought that I would be able to clear the final module in first attempt but thanks to your tips and techniques to approach the final module which enabled me to clear the exam.

Your stepwise problem solving approach is 'The Best'. The video learning kit has definitely cleared all my doubts and gave me a conceptual clarity which was lacking earlier.

The case studies and the stepwise solutions which you have provided are really excellent.

I highly recommend your video learning kit to CFP aspirants.

Thank you once again for your support

Regards,

Atul Gaikwad
Cell - 9923047121

110th Success Story:

Mr. Sunit Nahata, Senior BFSI Professional & IFA, Kolkata, He was twice unsuccessful in CFP Exam 5/Final and joined our Video Learning Kit in Aug.'13 . He has successfully completed his CFP Exam 5/Final @ 1st attempt with a "B" Grade in Nov.'13.

Sunit Nahata <sunit.nahata@yahoo.in> Mon, Nov 11, 2013 at 5:58 PM

Reply-To: Sunit Nahata <sunit.nahata@yahoo.in>

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

Dear sir,

Greetings for the day & sorry for writing you a bit late I take this opportunity to thank you and appreciate the time and effort you devoted to help me in clearing my exam5 of the CFP.

The Video Learning Kit provided by you was an eye opener. It gave me the conceptual clarity that I had never gotten before. The video learning kit I as good as doing a four day workshop.

Anyone who wishes to be a Certified Financial Planner, I recommend should go through your Video Learning Kit or attend the Fast Track CFP Workshop.

Once again Thanks a ton...

Regards,

sunit nahata

9830675528

109th Success Story:

Mr. Rajnish Dhawan, Wealth Manager- Axis Bank, Delhi, He enrolled in our Video Learning Kit in June'13 and Successfully cleared his CFP in Challenge pathway in Oct.13.

RAJNISH DHAWAN <rajnishdhawan83@gmail.com> Sat, Nov 2, 2013 at 11:18 PM

To: Keyur Shah CFP <keyur.shah1975@gmail.com>

Dear Keyur Sir,

I am really very grateful and thankful to have a coach like You who provided his valuable time and effort's for me.

"Guru Mantra" to Succeed in the exam given by You is FIVE STEP PROCESS, which if followed religiously by the student, helps a lot in clearing the exams.

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.

The SUPPORT given by You after training program, i.e. during post training practice is really commendable. Only by the God's Grace & destiny, I have a coach like Mr Keyur Shah, who consistently pushed and also motivated me to appear for the exams. Last But Not Least, Thank You So Much For Every second of time You devoted just to make me CFP whole heartedly.

Best Regards

Rajnish Dhawan

09540358666/08588818765

108th Success Story:

108th Success Story of our Video Learning Kit: Mr. Chetan Pandya, FRM, Head- Investment Advisory & Risk Management-TrustPlutus Wealth Management (India) P. Ltd., Mumbai.- He has enrolled in Video Learning Kit in Aug.'13 and successfully completed his CFP in Challenge/Fast Track Pathway in Oct.'13.

Chetan Pandya <chetan.pandya@trustplutus.com> Sat, Jan 18, 2014 at 1:32 PM

To: keyur.shah@thecfpaspirantclubindia.com

I found video training program offered very useful and time saving. I was able to grasp the concept quickly and calculate case studies with program which squeezed my time requirement.

Also Mr. Keyur was very helpful in guiding for the exam as well solving queries post video learning. His promptness and willingness to clear doubt is commendable.

This training and help of Mr. Keyur has played major part in my clearing of CFP exam in short span of time. Thank you and wishing all the best to Mr. Keyur Shah.

Chetan Pandya, FRM

Head – Investment Advisory and Risk Management

TrustPlutus Family Office & Investment Advisers (India) Private Limited

1101, Naman Centre, G – Block, C – 31,

Bandra Kurla Complex, Bandra (East)

Mumbai - 400051

Tel: +91 22 40845000 , Fax: +91 22 40845066

Mobile: +91 9167790592

chetan.pandya@trustplutus.com

www.trustplutus.com

107th Success Story:

Mr. Pranav Jain was an unsuccessful in CFP Exam 5/Final & later on joining our 33rd Batch Mumbai in July'13 and successfully completed his Final/Exam 5 @ 1st Attempt with a "B" Grade on dates 28th Oct.'13.

Pranav <pranav.jain@prudentcorporate.com> Tue, Oct 29, 2013 at 5:49 PM

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

Dear Keyur Sir,

On the outset I would like to thank you for your support and sharing of knowledge during our workshop I was unsuccessful in clearing final exam previously now I realize the difference in training I use to solve sums via complex formulas and was trying to tally answers with already provided solutions but your ideas , teaching technique and process changed my way of learning and I literally understood the concept of financial planning which helped me in understanding and I am confident to take it to bottom level where our client needs education on financial planning .

I would be honest I always hoped u have sum master imp solutions which will help me to clear the exams but rather your training and post training support cleared my fundas now exam clearance was a only formality.

I once again thank you to be available all the times . In my journey I will never forget 3 things which I have learned from you

1. Control the controllable
2. 5 Universal steps
3. Trust your coach

I am confident that above things will help me in real life situations.

I wish u luck and successful year ahead and see you reach 200 CFP participants under your training by next diwali . I will be always available to help you.

Thanks and Regards
Pranav Jain

106th Success Story: Mr. Gowri Shankar, Senior Established IFA, Share broker & Financial Planner based out of Secunderabad, AP. He had Enrolled in CFP 6+ year before and finally stuck in CFP Exam 5/Final Exam more than 3 years. He has enrolled in our Video Learning Kit in Aug.'13 and successfully completed his CFP exam 5/Final in Oct.'13 @ 1st attempt with a "B" Grade.

G Shankar <gshankar@zenfxnfunds.com> Wed, Oct 30, 2013 at 9:38 AM

To: Keyur Shah <keyur.shah1975@gmail.com>

Dear Sir,

I cannot describe as to which area I did not get his help and support, as I got his support in all matters.....

Beginning from Fixing up my Examination Date, dealing with FPSB, numerous and minute details on tackling the examination. Further, I being technologically challenged (not proficient

in using MS Excel) I could not have got off the phobia and cleared the examination but for his assurance and support on using the FC 200. Thanks ... a.... ton.... Sir.

Regards.,

N.Gowrishankar

For ZEN FOREX & MANAGEMENT PVT.LTD.

9-1-87, (1st Floor), Sangeet Cinema X Road, Sarojini Devi Road,

SECUNDERABAD,AP 500 003

Mob: + 91 98482 72700, Off: (040) 2771 5421 / 5430

www.zenfxnfunds.com, www.zeninsure.com, www.3rdeyefinancialplanners.com

105+ Success Stories of our Video Learning Kit & Fast Track CFP Training workshop:

105th Success Story:

Manu Sreenivasan- Director, Private Family Office- Hyderabad (09000711510)- Joined our 28th Batch in Hyd May'13 and Successfully cleared CFP Exam 5/Final in a Challenge Pathway @ 1st attempt with a "B" Grade on 1st Oct.'13.

Cleared Exam 5 - Thank you...

Manu Sreenivasan <msreenivasan@hotmail.com> Thu, Oct 10, 2013 at 2:08 PM

To: "keyurcfp@thecfpaspirantclubindia.com" <keyurcfp@thecfpaspirantclubindia.com>

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

Dear Sir,

I am extremely delighted to inform you that I have cleared Exam 5 in Challenge Mode in my first attempt. Thank you for all the training, and post training support provided.

I would like to highlight some of the things that helped me successfully clear the exam with B grade, and

Hopefully help in future practice as well:

1. Training was a good mix of focus on the exam as well as on establishing a FP practice Not only helped in clearing the exam, but am sure will help in building a successful practice in future.

2. Specific techniques on approaching the problems Solving as an offline exam Practically doing away with excel, and getting comfortable with the calculator Principles to remember for each type of question Time management and sequencing of attempting the questions.

3. Good repository of sample questions based on actual cases along with solved notes Helped work with the data in actual cases and get familiarized ahead of the exam Repository of the 2 and 3 mark questions helped in getting a feel of what kind of questions could come in the exam.

4. Post training support

I could discuss doubts in detail and thanks for the discussions that went on for a long time Updates on experience of candidates who attended exam after my training helped in clarifying few key doubts The study material provided helped in gaining understanding of various financial instruments, insurance products etc. I am sure even after they can be used as a reference for building a FP practice.

5. In the exam I got 2-3 tricky questions that were not covered in the training Here the tip of controlling the controllable helped me and I could focus on the questions I knew well and complete them well on time before spending time on the tougher ones Looks like in the recent past, the number of variables in each question has been increased, and I am sure only with good guidance and practice one can clear the exam with good grades.

I had to juggle my work, family, and preparation, and without your guidance it would have been impossible to achieve success.

Thanks and regards,

Manu.

104th Success Story:

Mr. Abhishek Rastogi (Merrut-9045866003/9219615141)- Enrolled in Our Video Learning Kit (June'13) & successfully passed CFP exam 5/Final in Sept.'13.

From: abhishek rastogi <abhirast23@gmail.com> on Sun, 29 Sep 2013 13:31:02To: keyur1975 <keyur1975@rediffmail.com>

Dear sir,

Finally I have cleared my advance financial planning examination on 26th Sep 2013.

It was all due to Keyur Sir's guidance and simple systematic approach towards exam.. Initially it was all lost picture for me...I have enrolled for CFP

way back in 2011 then after clearing 3 modules. In 2011 I took a break from CFP due to some personal commitments.. Then I have decided to appear for Tax planning and estate planning exam, Finally I made it in the second attempt.

After few online searches in 2013 I came into contact with keyur sir In June 2013 and finally have decided to enroll for his video learning Kit in early July and find sir's guidance as major tool for clearing Exam his post exam guidance helped me in many ways....

Note- good coach creates interest in the subject and I found my lost interest Back due to Keyur sir and find my lost confidence back and sky High..... credit goes to keyur sir and his 5 step process which Minimizes human error and made it simple for me to crack in seconds attempt.....

Regards

Abhishek Rastogi

103rd Success Story:

Dhairya Shah (T.Y-BFM Student-9819061095)- He attended exam 5 thrice but was unsuccessful. Then Joined our Video Learning in Aug.'13 & passed @ 1st Attempt on 10th Oct.'13.

Dhairya Shah <dhairya2010@ymail.com> Fri, Oct 11, 2013 at 7:07 PM
Reply-To: Dhairya Shah <dhairya2010@ymail.com>
To: "keyurcfp@thecfpaspirantclubindia.com"
<keyurcfp@thecfpaspirantclubindia.com>

Dear Keyur Sir,

I take this opportunity to thank you and appreciate the time and effort you devoted to help me be a success story in Exam5.

The Video Learning Kit provided by you was an eye opener. It gave me the conceptual clarity that I had not got before. It looked like I was getting personalized training with Mr. Keyur Shah CFP.

Anyone who wishes to be a Certified Financial Planner, I recommend should go through your Video Learning Kit or attend the Fast Track CFP Workshop.

Thanks a ton...

Regards,
Dhairya Shah

102nd Success Story: Charmi Shah, Fresher, She was unsuccessful twice (38 % & 29%) before joining our 34th Batch Aug.13 Mumbai. She has successfully passed Final/Exam 5 @ 1st attempt with the "A" grade (75%+) Post Training Workshop on dated 26th Sept.'13.

"A" Grade @ 1st attempt post Fast Track CFP Training Workshop:

Charmi Shah <charmipshah_101092@yahoo.co.in> Fri, Sep 27, 2013 at 12:13 PM

Reply-To: Charmi Shah <charmipshah_101092@yahoo.co.in>

To: Keyur Shah <keyur.shah1975@gmail.com>, "keyur1975@rediffmail.com" <keyur1975@rediffmail.com>

Respected Keyur sir,

I am glad to share that on 26-09-2013 I have successfully cleared Exam 5 with 'A' grade which was like a dream come true for me. I had enrolled for CFP in year 2011 and I had cleared 4modules in a year itself but because of my Board Exam (Third Year Bachelors in Accounting & Finance) I had to take a break from CFP studies. In May 2013 I started my journey towards Exam 5. Before joining Fast Track CFP I had already appeared twice for Exam 5 but unfortunately I did not clear. After joining 4days workshop of Mr. Keyur Shah I have a clear view about the concepts and also easy techniques to solve problems.

I would especially like to mention that the post training process which sir told us to follow is very fruitful and it has helped me a lot. Providing question banks and its handwritten solutions and also sitting for 4hours mock tests are like stepping stones towards assured success. By following all these steps I was not at all feeling nervous during the examination which helped me to build confidence. All we need to have is trust the coach.

I would like to express my sincere gratitude to Keyur sir as without his guidance 'A' grade would have been impossible for me. Thank you once again for putting efforts and also clear all my doubts.

Regards,

Charmi Shah. (09664256998)

101st Success Story: Mr. Hemang Desai, Senior BFSI Professional & Independent Financial Advisor- Surat.(09327392646)-Joined Our 31st batch Fast Track CFP training workshop in Ahmedabad (May'13) and successfully completed @ 1st attempt with a "B" Grade CFP Exam 5/Final in Challenge Pathway dated 6th Sept.'13.

Hemang Desai <desaihh@hotmail.com> Sat, Sep 7, 2013 at 10:12 AM

To: Keyur Shah <keyur.shah1975@gmail.com>, "keyurcfp@thecfpaspirantclubindia.com"

Dear Keyur Shah,

It all started with a desire to acquire adequate knowledge continuously, because by the grace of God, with knowledge & honesty, proper & lasting solutions are given to society. I saw such quality in you when first met you during your training assignment in ING Life. So I thank God to provide me a good mentor to prepare for Challenge Status Exam 5. Let me admit I am a layman in this financial field even if I am attempting to help people manage their family's financial matters since Feb 2001.

In 2001 I got the IRDA license through HDFC Life, In August 2005 I was certified by AMFI as Mutual Fund Distributor, Since November 2008 ING Life Insurance accepted me as Sales Manager, being an IFA (Gold) of Franklin Templeton (Who sponsored me as a Chartered Member for registration to FPSB India.)

Today, 6th Sept 2013, I could successfully pass CFP Exam 5 with B-Grade, add more knowledge & tested by the exam. What helps me most is your guidance regarding steps to be taken, a total process driven. I share here, basically how I prepared for Exam.

1. 3 days, $24 \times 3 = 72$ hours uninterrupted dedicated to Your Training at Ahmedabad 24th to 26th May 2013. You stuffed us with such a knowledge that I felt then only to digest it a little more time is expected from You. I happy to note that You have extended training for 1 day. 50% preparation was done than only.

2. 150 hours practice, after every six hours practice I wrote on paper your following instruction... Make one pager with key data of family, list important information, draw line with Goals, Read the question twice, attempt 2 marks Q first, then 3 Marks Q, then 4 & 5 marks Q of case 1 & then Case 2. Leave the question were stuck-up & later on handle same.

3. Don't talk (I suggest to keep cotton bud into your ears while giving EXAM, because I experienced some other people around me were asking for help & I got disturbed) or listen to anybody.

4. Don't See Answer.

In, I think, everybody's life such instruction is given by teachers but You have very clearly & repeatedly EMPHASIED all. I seriously took it as per your 1st & last talk, Believe in your Coach.

Thanks again Keurbhai , all concerned mention above, FPSB India & my family & friends.

Your student forever,

Hemang R.Desai

9327392646

SURAT-Gujarat-India

100th Success Story: Miss Minali Shahri (09769357056), working as Financial Planner with a Bajaj Capital, Mumbai. She has attended our 33rd Batch (July'13) and successfully passed CFP exam 5/Final @ 1st attempt with a "B" on dated 10th Sept.'13.

Letter of Appreciation

Minali Shahri <minalishahri@gmail.com> Fri, Sep 13, 2013 at 8:44 AM

To: "keyur.shah@vantagein.co.in" <keyur.shah@vantagein.co.in>

Dear sir,

Greetings for the day!

I would like to thank you whole heartedly for helping me throughout the training as well as after training to study for the exam and secure B Grade in Exam 5. I required in depth study 'because of gap in studies moreover apart from exam point of view your steps and concepts also help in real life situation and I can feel that difference since I've joined my work. Overall it's a huge step forward for growth. This wouldn't be possible without your help and support and especially the positivity and confidence you got in my mind. During the training session you were available to solve queries even after the lecture and made sure all the concepts sinked in our mind.

After the training almost daily contact and 10+ hrs personal training/query handling of my visit to your office made this success possible.

Thank you so much sir.

Regards,

Minali Shahri

99th Success Story: Naresh Kumar Vashishta (09899156070)- Senior Banker with State Bank of India-Delhi. Enrolled for our Video Learning Kit (V3-50hrs) in

June'13 and Successfully passed CFP Exam 5/Final in the challenge pathway @ 1st Attempt at Sept.'13.

CFP EXAM

n.vashishta@sbi.co.in <n.vashishta@sbi.co.in> Fri, Sep 6, 2013 at 10:36 PM

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

Dear Sir,

I am glad to inform you that I passed the CFP exam5/Final @ 1st attempt today. It could happen only due to your able guidance and Video Learning Kit.

The Video Learning Kit is immensely useful. One can study at odd hours and at a convenient time. Though I am banker, but you clear the concept of PPF/ saving schemes and loan calculations.

Once again I thank you from core of my heart for all your support.

regards,

Naresh Kumar Vashishta

98th Success Story: Mr. Raju Das(09674719820), Senior Banker with State Bank of India-Kolkata-Attended our 30th Batch in Kolkata (May'13) and successfully cleared CFP Exam 5/Final in Challenge/Fast Track Pathway in Sept.'13.

CFP Exam 5 Challenge Status

RAJU DAS <raju.d74@gmail.com> Tue, Sep 10, 2013 at 6:48 PM

To: Keyur Shah <keyur.shah@vantagein.co.in>

Dear Sir,

I am very glad to inform you that I have cleared the Final Exam Module 5 on 7th Sep 2013. The way you have chalked out the whole program is superb. The uniqueness of your approach to solve the problems help the candidates in a big way.

I would like to mention two salient features of your teaching:

1. The timeline : The drawing of time line before starting the calculation itself remove all the hindrances of the problem. The obscurity of the problems becomes easy in that way.

2. Use of the Financial Calculator: The use of financial calculator instead of the Excel creates a huge difference in solving the problems. The cumbersome approach of Excel is easily overcome by this. The right way of using the calculator is the basic but most essential tools for this exam.

Last but not the least, the constant help and guidance provided by you over phone, mail and boosting up the morale is many ways responsible for clearing this exam for me.

Thanks a ton for being with me in this memorable journey.

Warm Regards,

Raju Das

97th Success Story: Mr. Santosh Kedari, Established Independent Financial Advisor based in Pune, Enrolled for Video Learning in June'13 and Successfully passed CFP exam 5/Final in Sept.'13.

S P Kedari <spkedari@gmail.com> Wed, Sep 18, 2013 at 11:16 AM

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

Dear Sir,

I would like to thank you for your video learning and coaching facility which help me to clear the CFP exam. Your study covers all required topics and case studies which are beneficial not only from exam point of view but also for practical purposes.

Also, the clarity of concepts is amazing. Do and Don't was very informative and all minute details were covered. The process and application of step by step case studies were very helpful.

Your teaching and presentation skills, your speed of delivery , sequence of lectures and study material were all very informative and useful.

Due to video learning facility one can watch the videos as per their convenience and get the same benefit of attending your session.

Regard

Regards

Santosh Kedari.

Lifins Financial & Sanriya Investment Advisors Pvt. Ltd.

968/1, Senapati Bapat Road,
Opposite Ratna Memorial Hospital,

Between ATM of PNB and Vidya Sahakari Bank, Pune 411016,
(M) : 9822 403 407, 9371 011 297
(E): Sanriyainvest@gmail.com; spk@sanriya.in
(w): www.sanriya.in

96th Success Story: Mr. Viraj Padhye, Safe Hands Financial Services- Pune (9923430110)-Attended our 34th Batchin Mumbai (Aug.13) and successfully cleared RPEB, TPEP and Exam 5/Final @ 1st attempt with a "B" grade in just one month.

Veena Padhye <veena.padhye@safehandfinancialservices.com> Sat, Sep 28, 2013 at 6:58 PM

To: "The CFP Aspirant Club (India) Keyur Shah"
<KeyurCFP@thecfpaspirantclubindia.com>

Hi Keyur,

Please find my experience-

Testimonial – "Learned systematic approach of solving mathematical problems which are difficult to find in any book in the market. Once you complete your theory of all subjects, this is a must to attend the program. It would have been difficult for me to pass so soon without this training.

Thanks to Keyur. Study material is also very rich.

One will get tired doing all that study material provides."

Regards,

Viraj Padhye

Below Mentioned participants have successfully progressed in Regular pathway and passed Module exams.

- 1) Kamal Jeet Singh-Training manager-PNB Met life-Delhi-9999983980- Successfully passed IP with the help of our Video Learning Kit in Aug.'13 and aim to clear CFP exam 5/Final in Oct.'13.
- 2) Ashwariya Surana (81st Success Story) - She has clear her 2nd Module Exam RPEB @ 1st attempted in Sept.'13 & Investment Planning @ 1ST Attempt with a "B" Grade in Oct.'13.
- 3) Riha Agarwal (71st Success Story) - She has Cleared her 3rd Module Exam- IP
- 4) Mr. Anil Mutalik (87th Success Story)- He has passed his 3rd Exam – TPEP @ 1st attempt in Sept.'13.

- 5) Mr. Srinivas-Hyderabad (09701956446)- Joined in Video Learning in July'13 & successfully passed Retirement planning in Sept.'13.
- 6) Mr. Manuel Xavieer-IFA-Kochi (09895880576)- Enrolled in Video Learning Kit in Aug.'13 & successfully passed Investment planning in Sept.'13.

95th Success Story:

Sandeep Gandhi, Senior Established Independent Financial Advisor, Rajkot (09825078399)

Mr. Sandeep Gandhi attended our 31st Batch Fast Track CFP in Ahmedabad & successfully completed CFP Exam 5/Final @ 1st attempt with a "B" Grade in Aug.'13.

Rtn Sandeep Gandhi <sandeepigandhi@gmail.com> Thu, Sep 5, 2013 at 6:30 PM

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

Dear Keyurbhai,

Greetings!!

There are universities (FPSB), there are libraries (EP) but then also we need a good teacher, however, though we feel ourselves smart and experienced.

Mr Keyur Shah, has really designed a very good water tight curriculum, to acquire the CFP. Moreover, his after 3 days training, 24x7 support is very appreciative. He makes it sure that the candidate applies and appears the test, in a right way. He has a 'self ISO' like system developed for each and every stage of learning e.g. drawing a correct time line, note down the process of solving the problem, golden principles to follow and even clear cut guideline for appearing the final exam, which if followed religiously by the student, helps a lot in clearing the exams. He is also continually updating the student about the structure of the questions, style of question paper etc. which shows his passion for the profession.

I am lucky to have a coach like Mr Keyur Shah, who consistently pushed and also motivated me to appear for the exams. I am thankful to him that I can clear the set of exams at one shot.

Regards,

Rtn Sandeep Gandhi

President 2012-13

+91 98250 78399

Rotary Club of Rajkot

Celebrating Platinum Jub

94th Success Story:

Elizabeth Micheal, working with a leading financial organization based out of the UAE, Enrolled in our Video Learning Kit in April'13 & successfully completed CFP in the challenge pathway in Aug.'13.

**Liza Tony <liztejus@gmail.com> Thu, Sep 5, 2013 at 4:28 PM
To: Keyur Shah CFP <keyur.shah1975@gmail.com>**

Dear Keyur Sir,

Happy teachers' day

I express my sincere gratitude for making me a CERTIFIED FINANCIAL PLANNER, Without your fast track coaching and video learning kit I would not have made it. I urge all students to follow sir's class word by word, even to use the calculator as sir suggests (which is also an integral part of passing the exam).

Video participants during the class, take not under each video which topic is covered so that in the final preparation for any clarifications you can easily go back to the video. Post training also each and every doubt when you study; note it down and get back to sir, There will be a reply for sure. This support makes us more motivated to achieve CFP.

**Thanking you!
Elizabeth Micheal
+971-554894878**

93rd Success Story:

**Mr. Hareesh MV, AVP, Hedge Equities Wealth Management Services, Kochi
+91 994 666 5447, Joined our 23rd batch Jan.13 Fast Track CFP Training Workshop in Kochi and
successfully passed Tax & Estate Planning & Exam 5/Final @ 1st attempt in Aug.'13.**

Completed CFP All modules - Thank You

**HAREESH MV <hareesh.mv@gmail.com> Thu, Sep 5, 2013 at 7:18 PM
To: Keyur Shah CFP <keyur.shah1975@gmail.com>**

Dear Sir,

Thanking you for your kind support and meticulous training guidelines that enable me to successfully crack CFP modules, especially the final one in the first attempt itself. Before attending your Fast track training session conducted at Kochi (23rd Batch in Jan. 2013) and had completed 3 modules (Minus Tax) and undergoing more or less self study. Had undergone few

sessions through a Delhi based educational service provider in their Chennai Center during weekends.

Your session was exemplary and distinctive in a sense, its clear and focused on how to crack the exam if we stick with the process and most importantly believe your coach. I have not got a grade that I aimed for since I have not able to devote the full time period as you have advised, due to personal and official turbulence during the period. So as refocused on the final Module just for a couple of weeks only and able to complete the journey successfully by this Monday.

Also extending thanks to other batch mates whom have shared their experience during the time and wishing you all the best success in your career moving forward.

Once again reiterating the fact that it's all stick to the process and follow the guidelines laid down so specifically by the No.1 Coach.

Thanking you again & Kind Regards

Hareesh M V

AVP, Hedge Equities Wealth Management Services, Kochi

+91 994 666 5447

92nd Success Story: Mr. Sailesh Nagar, Senior Family Office Advisor-Chennai, Attended our 28th Batch (May'13) Fast Track CFP Training workshop in Hyderabad. Successfully completed CFP Exam 5/Final exam @ 1st attempt with the "A" Grade in Aug.'13.

Subject: Cleared CFP Final Module

From: Sailesh Nagar <sailesh.nagar@gmail.com> on Thu, 05 Sep 2013 16:03:18To: Keyur Shah <keyur1975@rediffmail.com>

Dear Sir,

Further to my attending training for the Advanced Financial planning Exam 5 module with you, I am glad to inform that I have cleared the final module on a few days back with "A Grade" .

And to my satisfaction the best part of it is that I did it in my first attempt as I had inspired to do.

I wish to place on record my sincere thanks, appreciation and gratitude to you

for the excellent approach provided in your sessions, the exhaustive question bank and post Training support. Even though, I did my program early may 2013 you provided the vital support over the phone till my last query was resolved.

I would emphasize to all CFP aspirant's attending your program that they need to concentrate on the "Do's & Dont's " and other vital approach parameters in solving problems which you provide during the training session, and that the post training preparation of 150- 180 hours is a must and overcoming the module without that would be close to impossible.

Thanks again for your support and shall look forward to the further knowledge addition in future.

Best regards,
Sailesh Nagar.Chennai. 09940198646

91st Success Story: Mr. Jitesh Patankar, Senior Relationship manager- Bancassurance, Bajaj Life-Mumbai. Attended our 26th batch (April'13) Fast Track CFP training workshop in Mumbai and successfully completed CFP certification in the challenge pathway in Aug.'13.

Success story

jitesh Patankar <jitesh.patankar@gmail.com> Wed, Aug 28, 2013 at 4:30 PM

To: Keyur Shah CFP <keyur.shah1975@gmail.com>

Dear Keyur Sir,

I first of all very much grateful and thankful to you for providing your valuable time and effort's for me. Under your guidance have cleared the CFP certification exam with 1st attempt with a "B" grade in challenge pathway. Your Guidance post training was very much helpful.

I like your solving problems technique which was very much useful during the online examination process. In short all my efforts were given a new look by your training and help.

Regards & Thanks,

Jitesh

09820884708

90th Success Stories:

Mr. Bhasskar Prakash, Share Broker & IFA-Patna, Enrolled for Video Learning Kit in May'13 & attended our 32nd Batch in Mumbai in June'13 and successfully completed his CFP Exam 5/Final Exam @ 1st Attempt on 20th August'13. (08454874567)

Bhasskar Prakaash <bhasskarprakaash@gmail.com> Sun, Aug 25, 2013 at 11:58 PM

To: Keyur Shah CFP <keyur.shah1975@gmail.com>

Dear Sir,

I am happy to share with you that I have successfully passed the Exam5/Final @1st attempt. I am very much thankful to you for the support you provided me especially after post training workshop. It was simply awesome without which my success story could not be written. Every time I approached you with queries over the telephone you responded very generously & clarified my all doubts without bothering for time spent over the phone. This kind of post training support is very rare.

Earlier, in the workshop which ran for two extra days also helped me greatly in learning some decent concept like use of P/Y & C/Y in financial calculator, solving for SIP in existing funds under an asset allocation & re-balancing strategy, and many more such concepts to name.

I also opted for the video learning kit. It is like an icing on the cake. It is very difficult to retain everything you learnt in the workshop due to its hectic schedule. So, it comes very helpful to embedding those learning permanently with you by watching the recording of the workshop at your convenience at your own home. It is a wonderful idea pioneered by you. It is a must for those who reside outside Mumbai.

The question bank provided by you is really a whole universe for any sort of questions especially for exam 5/ AFP and for all module exams as well. One who goes through it can be rest assured for 100% success without any doubt in the mind. I found no questions (except a few questions with very slight variations) in the exam based on the other pattern than those given to the question bank.

I strongly recommend every CFP aspirant to join this workshop and learn first the right concept of theory & the advance financial planning process, then practice a lot to embed those concepts and then go for a series of mock test (strictly under the exam conditions) before appearing for the final exam. Mock test is very essential for success. It will infuse much needed confidence in you which is essential for the exam. You will also learn what to do or not to do during the exam.

I wish all the best for the CFP aspirants for their success.

Regards,

Bhaskar Prakaash

89th Success Story:

Mr. Mihir Sanjanwala, Senior Wealth Manager @ HDFC Bank, Mumbai.
Enrolled in Video Learning Kit (May'13). He Successfully passed Tax Planning & Estate Planning (Exam 4) @ 1st attempt with a "B" Grade (June'13) & CFP Exam 5/Final Exam with a "B" Grade dated 13/8/13.

Subject: CFP Final Exam.....From: MIHIR SANJANWALAon Wed, 14 Aug 2013 10:43:26To: "keyur1975@rediffmail.com"

Dear Keyur,

Greetings for the Day !!!

Finally, yesterday I have cleared my CFP Final Exam...

A big share of the credit for the same goes to Mr. Keyur Shah.

I had enrolled in the CFP Certification program in the year 2010 under the self- study & the pace of my progress was very slow due to hectic work schedule. I had cleared first 3 modules on the borrowed & study basis. Final 2 modules viz Tax Planning & Estate Planning & Advance Financial Planning were remaining...

I could not move forward as myself study was not value added to me as due to my approach which was mainly Exam focussed was not adding any value. One day while surfing on the Internet about CFP Preparations, I learned about Keyur Shah & after seeing his video – approach to Exam & most important Financial Planning process, I decided to enroll for Video Learning mode. His techniques were simple & easy to understand as well as very Effective while implementation. I found my lost interest. One of the important things I would honestly like to confess here is you need to have faith in your mentor & must follow his steps with dedication & I aim dead sure success would be yours.

I would like to express my sincere gratitude to Mr. Keyur Shah as without his guidance, it would be difficult for me to complete my journey & reach the ultimate destination. "May God Bless U for Your Noble Effort & May the Light of Knowledge spread across the World."

Warm Regards Mihir Sanjanwala+919821197761

88th success story:

Prajakta Wadekar (Fresher, Completed Graduation), Attended our 29th Batch May'13 in Mumbai & Successfully passed her Final/Exam 5 @ 1st Attempt on 12th Aug.'13. (09867976106)

Thanks giving

Prajakta Wadekar Tue, Aug 13, 2013 at 2:02 PM

To: Keyur Shah CFP

Respected Keyur Sir,

I am glad to inform you that I have successfully cleared Exam 5/Final @ 1st attempt on 12th August 2013. Your proper guidance and training made it possible.

The Fast Track CFP training workshop at Dadar was very convenient and informative. Many of my concepts got cleared. The notes provided by you, with proper handwritten solutions were Very helpful. Your post training guidance also helped a lot in solving all the doubts on an immediate Basis.

I am very much thankful to you for providing such an effective training and post-training guidance.

With regards, Prajakta Madhukar Wadekar.

87th success story:

Mr. Anil Mutalik, Senior LIC/MF Advisor-Mumbai, Joined our Video Learning in month of June'13 & successfully completed Retirement planning @ 1st Attempt in Aug.'13 & aim to complete balance modules by Dec.'13

Respected Keyur Sir,

I am glad to inform you that I have cleared Retirement module on Wednesday dated 7th Aug'13.

It was possible only because of the video learning kit. This helped me to revise and clear the basic concepts of financial mathematics. The video learning kit helped me to revise and repeat the portion of my pace and convenience of time. This helped me to study at my own timing which otherwise was not possible in the classroom teaching.

Being in Insurance advisory business, this is actually a hands on practice for me. When I applied the same technique to my customer, I could turn the proposal into big policy of 50L term insurance. There

were two cases which I could turn to big SA and bigger coupon size in the last month.

I am again thankful to you for providing me the telephonic support on an almost daily basis.

I am very much thankful to you for extending such innovative services to the CFP aspirant. I hope same sort of help will be extended to me till I finish the remaining part of the CFP.

With warm regards,

Anil Mutalik

9869056100

86th Success Story:

Mr. Arun Prakash, Chief Manager-State Bank of India, Devgadh-Jharkhand. (09771435401)-Enrolled our Video Learning Kit (v3-50hrs) in May'13 & Successfully passed CFP Exam 5/Final @ 1st attempt with a "B" Grade on 27th July'13

Prior to joining video learning, I attempted Exam 5 in self study and got only 30 marks...The Video Learning has helped to learn basic financial mathematics & advance goal based corpus/SIP calculations & updated question banks with detailed solution helped to do right practice and Keyur Sir has extended his full support when ever is required.

I learned many new concepts which I was not familiar even though I am working as senior banker like PPF, Real Estate, Ideal Asset allocation strategy etc.

I recommend all bankers to enroll for video learning before going CFP exam.

85th Success Story:

Mr. Harish Barke, Financial Planner, Ffreedom Financial Planner, Mumbai (09172350468)-Joined our 33rd Batch in July'13 & Successfully passed CFP exam 5/Final @ 1st attempt in Aug'13.

Testimonial

Harish Barke Wed, Aug 7, 2013 at 11:17 AM

To: Keyur Shah CFP, keyur shah

Dear Keyur Sir,

I have passed my CFP Final Exam on the first attempt. I would like to sincerely thank you for your efforts put in during the training sessions. Also the question bank prepared for the final paper case studies greatly helped.

Moreover I would like to thank you for explaining the concepts so clearly that I could clear the Exam without much preparation.

In all, the credit goes to you for your training and help.

Thanks again.

Harish Barke

84th Success Story:

Mr. Valerian D'Souza, Independent Financial Advisor-Mumbai. (09769260891/09322210891) joined our Fast Track CFP Training workshop in Dec.'12 and Successfully Retirement Planning with a "B" Grade @ 1st Attempt in Jan'13 and Tax Planning & Estate Planning in month of March'13 From: Valerian Gracias Dsouza on Wed, 14 Aug 2013 13:13:57To: "Keyur Shah "

Dear Mr Keyur Shah

I thank you Sir that today I am a Certified Financial Planner and all credit to you .I can surely say if not for your FastTrack Training workshop this would not be possible .The study material is well prepared and extremely helpful and I admire how you personally solved all my difficulties-on phone & personally

Thanks once more. Do continue the wonderful work of helping many more financial planners achieve their dreams

All the best

Valerian Dsouza

**Independent Financial Adviosr-Mumbai.
09769260891/09322210891**

83rd success story:

He further attended Training in our 26th Batch Mumbai in April'13 & Successfully passed Final/Exam 5 with a "B" Grade on 7th Aug.'13.

82nd Success Story:

Mr. Peter Paul, Australia, Joined our video learning in June'13 & successfully completed

IP & TPEP @ 1st attempt in July'13 and Aim to completed CFP Final/Exam 5 in his next India visit.

81st Success Story:

A Youngest Participant of Our CFP Aspirant Club, Ms. Aishwarya Surana-Guwahati-Assam-Studying in a 1st year B.Com (09864806108)-Attended both Video Learning & Classroom (30th batch Kolkata in month of May'13)-Successfully passed her 1st module exam Risk Analysis & Insurance Planning @ 1st Attempt with a "B" Grade post Training Workshop on dated 16th July and aim to balance four exams by Nov.'13.

Aishwarya manoj surana <manoj-surana@gmail.com> Wed, Jul 17, 2013 at 10:29 AM

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

Dear keyur sir,

First of all I am very grateful to you for providing me the help whenever I asked for. I had attempted for the RAIP module once before joining your workshop as well as video learning kit but couldn't click it and after post training I have cleared my RAIP module successfully with B grade.

The study material which you have provided is exhaustive and very much sufficient. The five step process is a great technique for solving the sum in the stipulated time period. Also the usage of p/y and c/y is great...Which you taught us during the video learning as well in classroom training workshop.

The financial calculator makes it easier to solve the sums. Your guidance was also a great help in the post training preparation.

Last but not the least, THANK YOU for all your support and the help that you provided without which i would not have been able to pass my exam with such a good grade.

Regards,

Aishwarya surana

80th Success Story: Mr. Jagdish Suvagia, Independent Financial Advisor based in Surat (09998989096), Successfully passed CFP Exam 5/Final @ 1st attempt post training WS on dated 15th July. He attended 32nd Batch Training WS in month of June in Mumbai.

From: Jagdish Suvagiya <jsuvagiya_01@yahoo.com> on Wed, 17 Jul 2013 13:28:32

To: keyur1975@rediffmail.com

I STRONGLY RECOMMEND ALL CFP ASPIRANTS TO ATTEND THIS CRASH COURSE THAT WILL HELP NOT ONLY TO CLEAR FINAL EXAM AND ALSO HELPFUL TO LAUNCH HIS FEE BASED PRACTICE.

GOOD WORK...KEYURBHAI....KEEP IT GOING UP AND MANY MANY THANKS FOR ALL YOUR SUPPORT AND GUIDANCE.

WITH THANKS,

Jagdish Suvagiya

79th Success Story:

Ms. Paromita Mukherji works with a leading MNC Private Wealth Management Company based in Kolkata in Operation Dept. (09836498881)- She had attended our 30th batch-Kolkata in the month of May and successfully completed her CFP in the challenge pathway @ 1st Attempt with a "B" Grade.

paromita mukherji <paromita.mukherji@trustplutus.com> Wed, Jul 17, 2013 at 3:07 PM

To: shah.keyur@thecfpaspirantclubindia.com

Sub.: Thank you

Dear Sir,

It gives me immense pleasure to inform you that I have cleared the Fast track CFP exam with a grade B in the very first attempt. I would like to take this opportunity to thank you for all the help and guidance that I received from you. Your training was truly the best that I have attended till date. Infact the question bank prepared by you is absolutely similar to the pattern of questions that come in the exam.

Thank you again.

Regards,

Paromita Mukherji

78) N S Kishore Kumar, Retired Senior Banker (SBI & HDFC) - Currently working as a Management Consultant in Mumbai & Independent Director on various leading BSE/NSE Listed Companies (kishkay@yahoo.com, 09320561929)- enrolled in our 25th Batch in March'13 & successfully passed CFP Exam 5/Final Exam in Challenge Pathway dated 18th June'13.

Dear Keyur ji,

Thanks to your unstinted efforts, I could clear the fast track exam in the first attempt...my experiences are summarized in the attached testimonial..

Challenge Status- Fast Track Training conducted by Shri Keyur Shah

This training program was of immense value to me in preparation for the exam...the design, content and delivery of course material by Keyur ji was par excellence...He is extremely committed, highly competent and sincerely concerned about the learning process of his students. His post-training support is comprehensive and effective....Thanks to his efforts, I could clear the challenge status exam in the first attempt.... I think Mr Keyur Shah is doing yeoman service to the cause of professional and ethical practice of financial planning.

N.S.Kishore Kumar, Mumbai

77) Mr. Hareesh, AVP-Hedge Capital-Kochi- Successfully passed Tax Planning & Estate Planning (Exam 4) with a "B" grade in July'13 and aim to complete CFP exam 5/Final by Aug'13. (Attended our 23rd Batch in Jan.'13 in Kochi)

76) Roopa Khatri-09819918163 (Senior BFSI Professional, Mumbai) enrolled for CFP in Regular Pathway- Completed her Investment planning (Exam 3) @ 1st attempt with a "B" Grade post Video Learning Training WS dates 18th June'13 & Aim to complete her CFP by Aug'13.(Enrolled in March'13)

Thanks a Zillion for your guidance & support.

Video learning was like Keyur Sir has come to my home to give me a private coaching.

75) Mr. Mihir Sanjanwala, Wealth Manager @ HDFC Bank, Enrolled via Video Learning Kit (May'13) & successfully passed Tax Planning & Estate Planning (Exam 4) @ 1st attempt with a "B" Grade (June'13). Aim to complete CFP by July'13.

74) Mr. Venkatraman Subramaniam (Chief Financial Officer- City of London Telecom, Bangalore)

Attended our 8th Batch @ Bangalore last year July'12 & successfully passed CFP Exam 5/Final in Challenge pathway on dated 22nd June'13.

CFP certificaion

Venkatramanan Subramaniam <svramanan.1968@gmail.com> Sat, Jun 22, 2013 at 12:02 PM

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

Hello Mr Keyur Shah

If you recollect, I attended your 2 day training program in BLR during Jul 2012. I passed the CFP CS status last Friday with B grade.

Thanks for your help and guidance. The type of practice questions that you shared were very useful.

Rgds

Venkatramanan

73) Mr. Sushil Sabarwal, Established Independent Financial Advisor, Mumbai (9821012113) Attended our 24th batch in Feb'13 & successfully passed CPFA Exam @ 1st attempt with 70%+ dated 20th March'13. Aim to complete his CFP by Sept.'13 in challenge pathway.

72) Mr. Dilip Butani (09223286283)- Senior Visiting faculty with various MBA colleges & full time working with Principal Retirement Advisor, Mumbai.

Attended our 25th Batch in month of March'13 & successfully passed CPFA Exam with 80%+ in June'13. Aim to complete the CFP in the challenge pathway by Sept.'13.

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) Mr. Nitin Rao, Independent Financial Advisor & Trainer, Pune (09665096021)- Attended our 10th Batch_Mumbai and successfully passed CFP Exam 5/Final in June'13.

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.

Wishing you all the very best for your future

Anurag Anand <anuraganand88@gmail.com> Thu, Aug 29, 2013 at 7:52 PM

To: Keyur Shah <keyur.shah1975@gmail.com>

Dear Sir,

Thanks for your professional guidance for clearing the Final module/Exam 5 in just one go after attaining training session on 19-21 April 2013. I appeared on 17th May 2013 and I never looked up before finishing my exam. I submitted my paper around 45 minutes before completion of time. I thank you from the bottom of my heart for your kind and humble support after training. As you know I frequently asked many queries which you solved diligently. I got 'A' grade, which I dedicate to you because without you it never was possible. Right now I joined Corporation Bank as clerk and expecting to clear the Bank PO exam within a year.

Regards

Anurag Anand

08875698381

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

27th Batch_Delhi.

65th Success Story:

Mr. Vineet Jain (09552519783)-Deputy General Manager- ING Life, Pune. 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 & cleared Investment planning in July'13 & completed CFP Final/Exam @ 1st attempt with a "B" Grade in Oct.'13

Thanks!!

Vineet Jain <vineet.r.jain@gmail.com>

Sat, Oct 12, 2013 at 2:33 PM

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

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

Dear Keyur,

Thanks for the guidance and I have cleared the final exam with 'B' grade. Initially I tried to do the course in self-study mode but then I realised a need for expert coach like you without whom I could not have cleared the exam in 7 months time looking to ongoing job requirement of a senior manager.

Your training and help you provided post training was very important. The books may give you knowledge but practical techniques can only be learnt in a classroom/Video learning in the same way as you can find karate steps on internet but without training under a guide you will never be able to master steps.

The preparatory material and way to prepare running-up to exams were also very useful. Thanks again for your guidance.

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:

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

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.

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

Regards,

Vineet Jain

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 & Passed Exam 5/Final @ 1st attempt with a "B" Grade on 8th July'13.

P.Srinivasan <srini_partha@yahoo.com>

Wed, Jul 17, 2013
at 12:11 PM

To: keyur.shah1975@gmail.com

Testimonial: CFP Exam 5/Final & Modules Exams (IP
& TPEP)
Dear Keyur,

I passed my CFP Exam 5 in grade B. In fact i have passed exam 3, 4 and 5 in quick succession.. Apart from the video learning kit, i should say that the your question bank prepared for the final paper case studies greatly helped. It provided the required practice in tune with the exam pattern. Thanks to you for timely help and please keep up the good work!!

Regards
Srinivasan

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 Exam 5/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 BFSIhiring.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}

Affluenz Family Office LLP

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™

101 A,Zodiac Avenue, Opp. Mayor's Bungalow,

Near Law Garden, Ellisbridge, Ahmedabad - 380006.

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 attened 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 Ffreedom 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 an 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.

CFP Exam Cleared

karthik venkat Sun, Sep 30, 2012 at 8:51 PM
To: keyur.shah@vantagein.co.in, Keyur shah

Dear Sir

I am Karthikeyan from Bangalore and hope you remember that I have attended the two days Training Workshop done by you in Bangalore.

I am happy to inform you that with all your Support & guidance I have cleared my CFP Final Module successful with B Grade. I sincerely thank you and dedicate this to you.

The steps & Process which you taught was very useful and I have blindly followed that. As suggested by you have collected 20 stapled plain sheets from the NSE and they have obliged me. I have used only one page per question completely. I have started with a listing of important information required for the question. Then draw the complete timeline and marked the information. Then listed out what is N=?, I=?, PV/FV=? Then started incorporating all these in the FC.

The second thing is as advised you I have practiced some 20 Case studies independently with Timer. Similarly, the probable questions and answers for the case studies made my job simple, it has given the psychological confidence when sit in the exam hall.

One more important thing which I would like to share is that I have not used Excel at all. I have completed 99% I have used only Financial Calculator only.

After completion of this exam I have started to use this confidently with my clients and they all appreciating and it is useful for me also.

I would like to Thank you once again for all your guidance and support

Thanking you Yours Truly
V Karthikeyan 9844252299

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) Rajeev 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 Sarda, IFA Jamnagar

04) Alpa Maniyar, IFA Jamnagar

03) Mr. Prithvi Potta, Asscoiate 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-Furutre 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.ACV 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.