

**"I just can't express my happiness in words..."-Vivekh Pathak**

**171<sup>st</sup> Success Story:**

Mr. Vivekh Pathakh, Sr. BFSI Professional, Delhi enrolled with us in Double Sure (Video Learning & Fast Track Classroom Training Workshop) in May'14 and successfully passed remaining Modules exams and Final /Exam 5 @ 1<sup>st</sup> attempt in Dec.14.

**Happy to share Good news..... Successfully cleared the Exam 5 In First Attempt.....**

Vivekh Pathak <vivekhpathak09@gmail.com> Tue, Dec 9, 2014 at 8:00 PM

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

Dear Sir,

Greetings.....

**I am very happy to share that I have cleared the Exam 5 in the very first attempt. I just can't express my happiness in words.**

Sir, before contacting you, it had been a year since I was preparing for CFP certification and was unsure, if I could attempt and clear the exam. Despite, joining classes with a reputed education provider, I was not happy with the mode of teaching as they follow a set pattern that might not be the right approach. At times during myself preparation before contacting you, I got disillusioned few times as the certification is not an easy one considering the complex nature of the calculations.

I remember the day I contacted you from Delhi and spoke with you over the phone for over an hour. I felt assured that I had approached the right coach post the long discussion with you. I took the decision to travel to Mumbai and attended the classroom coaching. This proved to be the right decision as it made the course content look simple with the process laid down by you to solve the questions/exam/s. Squeezing the entire course content within 4-5

days in such a way that does not look too heavy for a participant is absolutely amazing, considering the exhaustive course content.

You have designed a course that is bound to create success stories. Within my batch those who followed the process as laid down by you, have cleared the paper in first attempt. Although, I was skeptical of the video learning kit initially, since I had taken the classroom coaching and did not think whether video learning would really be of any value. However, this video learning kit proved to be a blessing in disguise, as I always felt I was constantly in the class when studying by the Video Learning Kit. The way you have designed both the modules cleared my self-doubt of clearing the certification.

Moreover, the amazing 5 STEP PROCESS and exhaustive question bank along with your constant support and continued guidance over phone calls to clear doubts made this journey look very easy and enjoyable. Moreover, when you offered me to attend the coaching again, that you were doing for the senior professionals in Delhi, so as to refresh my learning, I was humbled and really feel indebted by your selfless attitude. Not only this, your continued support post clearing the certification for setting up my own consultancy / practice, makes me feel that I not only have a coach in you, but also a guide, a support and a mentor.

**I am sure now, how smart CFP's are getting certified under your hands. You are truly the BEST and First Coach in INDIA who has not only designed the module to ensure the participants clear the exam, but also set up their practice as well. I really have a coach, a guide and a mentor in your now.**

Sir, with respect the exam, it was really a tough one and had the complex nature of questions designed to confuse the examinee. It needed expert skills to attempt and clears the exam.

The 5 Step process that needs to be followed as taught by you, the scientific steps to attempt the exam and follow a time schedule for the questions, designing how to attempt the exam in the first 10 minutes - laid down the foundation which helped me attempt the exam and clear the same without getting nervous a bit. The high success rate of participants in your training program is the result of this smartly designed course module and the process laid down to attempt the exam.

I once again feel indebted and thank you from the bottom of my heart.

Sincere Thanks for the continued support and guidance,

With Best Regards,

Vivekh Pathak

0 98 99 111 22 8

<http://vivekhpathak.wordpress.com>

**“THANK YOU”. This is the first and the most important thing without which I cannot start with. In fact, one thank you will also fall short in front of your guidance.- Ms. Aishwarya Surana.**

170<sup>th</sup> Success Story: Aishwarya Surana, Final Year B. Com Student, Guwahati-Assam, She enrolled in the CFP Regular pathway and unsuccessful twice in 1<sup>st</sup> exam and later on Enrolled with us in Double Sure (Video Learning Kit+ Classroom Fast Track Workshop) in May2014 and Successfully completed her all 4 Modules exams @ 1<sup>st</sup> Attempt and Final/Exam 5 with a “B” Grade. (1<sup>st</sup> Class- 60%+)

Aishwarya Surana <aishwaryasurana95@gmail.com> Fri, Dec 5, 2014 at 5:56 PM

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

Dear Keyur sir,

**I am very much glad to share that I have cleared all 4 module exams in regular pathway and exam 5/Advanced Financial Planning successfully on 2nd Dec within one and a half years along with my B. Com (Hons.) which is due to complete in 6 months.**

My journey of CFP did not have a good start until I joined Mr. Keyur shah Sir. After joining you, sir, I got to know that my concepts were not at all clear. But after attending video learning classes and classroom workshop, my concepts got cleared and then I successfully completed first 4 modules in a smooth manner at 1st attempt with a “B” Grade. Then I started preparing for exam 5 but due to some reason couldn’t click it. May be somewhere down the line I lost my confidence. But Keyur sir helped me boost my morale and motivated me to devote some time for self-analysis thus helping me figure out where I was going wrong.

**“THANK YOU”. This is the first and the most important thing without which I cannot start with. In fact, one thank you will also fall short in front of your guidance.**

Sir, your “5” step process is a great help with which the solutions to the problems become even more easier because when we actually go through the questions in the exam and if we don’t go through it twice, we would find it difficult as almost every question is twisted and ultimately land with a wrong answer. Also, I would specifically like to mention about question banks and solutions which are very much comprehensive enough to clear all our concepts. The study material is fully updated as per the syllabus.

Secondly, the post training support of yours has been just amazing and most importantly HELPFUL to solve almost every tough question in an easier manner by just following your valuable guidance.

**Last but not the least, your training is a “ONE STOP SHOP” where we can just close our eyes and trust our coach “MR. KEYUR SHAH Sir.**

Regards,  
Aishwarya Surana  
098 64 80 61 08

**169<sup>th</sup> Success Story: Mr. Shyam Jain, AGM (Training) -State Bank of India, Aurangabad enrolled in CFP Certification Challenge pathway way back 2012 but was unsuccessful... Later on He enrolled Video Learning Kit with us in Nov.14 and successfully completed his CFP certification in the challenge pathway @ 1<sup>st</sup> attempt with a “B” Grade on 29<sup>th</sup> Nov.14.**

SHYAM JAIN  
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**168<sup>th</sup> Success Story: Mr. Nitin Malhotra, Sr. Wealth Manager, Standard Chartered Bank, Delhi enrolled in Video Learning kit in May14 and successfully completed his CFP certification in challenge pathway in Nov.14.**

**“Sir, you are as a GAME CHANGER in our FINANCIAL PLANNING Industry. The concepts you've explained are crystal clear. Video learning was very helpful. It was as effective as live training or workshop.”-Vaishali Kale**

Happy to share 167<sup>th</sup> Success Story of The CFP Aspirant Club (India): Ms. Vaishali Kale, MBA (Finance), Sr. BFSI Professional (Founder- V Link Financial Services & Associated with a leading CA firm), Mumbai. She enrolled in the Regular pathway with one of Education Partner and completed her Training... She was unsuccessful in 1<sup>st</sup> module exam and later on enrolled in Our Successful Innovation called VIDEO LEARNING KIT in June2014. She successfully passed her all 4 modules exams and Final/ Exam 5 @ 1<sup>st</sup> attempt with a “B” (60%+ -1<sup>st</sup> Class) @ 1<sup>st</sup> Attempt on 29<sup>th</sup> November’2014.

Vaishali Kale <kale.vaishali@yahoo.in> Tue, Dec 2, 2014 at 12:22 PM

Reply-To: Vaishali Kale <kale.vaishali@yahoo.in>

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

My success story

Dear Keyur Sir,

**I'm glad to share that I've successfully completed my CFP certification in Regular pathway (all 4 Module exams) and Exam 5/Final - Advanced Financial Planning with a “B” - Grade (60+ First Class) on 29th November in just span of 6 months with the help of VIDEO LEARNING KIT.**

I would like to THANK YOU Sir for this success. This would not have been possible without your proper training & guidance. You're always there as a mentor in each and every situation. Thanks for boosting my confidence & ensuring me to do it in very short span of time. Because of time constraint it was very difficult to manage. But you were always one step ahead to help.

Sir, you are as a **GAME CHANGER** in our **FINANCIAL PLANNING** Industry. The concepts you've explained are crystal clear. Video learning was very helpful. It was as effective as live training or workshop. Each and every word said by you in the training or during my post training preparations makes sense. The approach to attend the exam or be it how to do post training preparation, are so perfect that there are no chances of failure. I would like to specifically mention about Question Bank and Solutions. They are very comprehensive, latest and always upgraded as per latest syllabus and more practical. You just need to trust your coach and success is yours. I did it in same manner.

I'm very proud today that I've completed my CFP<sup>^</sup>CM Certification and ready to deliver more valuable Services to my clients. The training not only helped me in professional level but on personal level too.

It helped me to budget my personal finances in an organized manner and I was able to prioritize My Goals and calculated inflation adjusted corpus required and also started investing for same...I think everyone must learn financial planning.

Keyur Sir, thank you once again for being part of my journey.

Regards,  
Vaishali Kale  
9870260192

#### 166<sup>th</sup> Success Story:

Ms. Pratibha Kumble, Jr. BFSI Professional, Dombivali, enrolled in Video Learning Kit in Aug.14 and successfully completed her CFP Exam 5 / Final @ 1<sup>st</sup> attempt with a "B" Grade (60%+ Firstclass) dated 25<sup>th</sup> Nov.14.

Pratibha Kamble <pratibhakamble16@gmail.com> Wed, Nov 26, 2014 at 10:52 PM

To: [keyurcfp@thecfpaspirantclubindia.com](mailto:keyurcfp@thecfpaspirantclubindia.com)

Thank you mail

To Respected & Dear Sir,

I am very glad to inform you that with the help of you I have cleared CFP certification with a "B" Grade. It was a great journey with your guidance & indefinite help. All the features of this training are just simply fine, best & useful.

Video learning option is the best option. It gives the feel of personal training. Anyone can see these videos as per their convenient level till the concept get cleared. "5 Step Process" is the truly secret of success. UNIVERSAL STEPS formulas are simply amazing. I personally realized that, If you follow principles, 5 Steps process, The UNIVERSAL STEPS & guidance related to how to attain the exam, Do & Don't etc that really helps you to crack the exam easily.

The High Quality Questions Bank with detailed handwritten solutions & the overall study material more than enough for exams.

Thank you for post training support till last minute of exam through phone & mail. MOCK TEST really helpful to Identify mistakes & leads to perfection.

Let me take the opportunity to THANK YOU once again for your support throughout the journey. Look forward your guidance henceforth.

Regards,

Pratibha

09920425510

165<sup>th</sup> Success Story: Mr. Shankarnarayan, Sr. BFSI Professional, Mumbai enrolled in Video Learning Kit Aug.14 and Successfully passed his CFP certification exam in Challenge pathway @ 1<sup>st</sup> Attempt in Nov.14.

Shankarnarayan A.S <shankarn.as@gmail.com> Wed, Nov 26, 2014 at 11:49 PM

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

Thank you, I cleared my Final Examination @ 1<sup>st</sup> Attempt in Challenge / Fast Track Pathway.

Dear Keyurji,

Greetings!!!

I am very happy to inform you that I have cleared my CFP Certification on Saturday 22nd November 2014. I would like to thank you for the coaching and guidance you provided me in the last 4 months.

My dream to be a CFP was on my wish list for 3 years. The Journey started 2 years back when I cleared my Retirement Paper. But professional commitments always came in between giving the other papers.

Your advice to apply for the challenge status was the first step to my success. Talking to you in detail on the steps that would help me achieve CFP certification made me confident. Hence I decided to take the Video learning approach from you.

**My confidence was not belied and I would like to share my experiences as your student.**

1. The video lectures were realistic and as good as attending your classroom Lectures. But the added benefit was that I could listen and assimilate them at my own pace.

2. The question bank & solutions provided were exhaustive, covered complex problems and prepared me for the Final Examination.

3. Most important, the support provided by you during the last 10 days before the exams in form of multiple mock tests was the icing on the cake. It made me aware of the gaps, how much more I had to practice and in true sense got me ready to take the final exams.

4. As per your guidance, I enrolled Charter member pathway which saved more than Rs. 15,000/- (Fifteen thousands) Vs. Education Partner or Self Study Mode.

Thanks a lot for being my Guru in this educational Journey. I wish you all the Success in all your teaching endeavors.

Thanks & Regards,

A.S Shankarnarayan

09820892177

164<sup>th</sup> Success Story: Mr. Ramesh Hegde, Sr. Independent Financial Adviser, Davanagere, Karnataka enrolled in Video Learning Kit in May14 and Successfully completed his CFP Exam 5/Final with a "B" Grade (60%+) in Nov.14.

RAMESH HEGDE <hegde3469@gmail.com> Tue, Nov 18, 2014 at 12:30 PM

To: keyur shah <thecfpaspirantclubindia@gmail.com>

Hi sir.

I am very happy to say that I have cleared my Final module with a "B" grade on 15 Nov 2014. I am very much thankful to you for providing the proper direction and guidance to me. So I produced the magic result that saved my

time, money, and build the confidence to write the exam because I completed 4 modules 3 year back and not thinking to complete the 5th module.

After I established the relationship with you i stated dreaming and that is become reality today.

**The way you taught calculating Goal based Financial Calculations (Retirement Planning, Children's higher education & marriage planning, Insurance Planning etc.) This multiplied my conversion rate, Ticket size and AUM and happy to share you that recently I received Highest SIP Awards by a Wealth Forum in Mumbai.**

Thank you & Regards

Ramesh Hegde

Hegde Financial Planning Services

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