

## **Benefits of CFP or CPFA (Knowledge and skills building Personal Financial Planning Domain)**

### **Growth and Survival Kit for BFSI Professional & IFAs**

#### **SELF:**

- 1) Helps you to decide your own right asset allocation and Goal based Financial Planning approach.
- 2) Teaches you to save more and invest more in right products.
- 3) Reduces your impulse expenses and bring the financial discipline.
- 4) Reduces element of speculation and keep you away from day/F&O trading
- 5) Peace of mind and financial independence in long term.

#### **CLIENT-PLANNER:**

- 1) Change your approach form "Product selling to Goal Based"
- 2) You can provide wider advisory services (Insurance to Estate planning services to Real Estate Advisory)
- 3) Helps in Trust building and Client Acquisition (right now in India only 1600+ CFPs & you are one of them)
- 4) Better conversion rate (through financial calculator)
- 5) Higher ticket size (with help of financial calculator)
- 6) Higher motivation and confidence level.
- 7) Family friend and trusted trouble shooter for all financial problems of family.
- 8) Finally, You can launch a FEE based advisory.

#### **COMPANY:**

- 1) Right approach brings more nos of clients, bigger revenue and better profit.
  - 2) Long term approach-higher retention of clients.
  - 3) Better productivity and Retention of employees.
- <http://www.scribd.com/doc/109565007/3-Full-Days-17th-to-21st-Batch-fast-Track-Cfp-Exam-5-4-3-Financial-Plan-Construction-Training-Workshop-Nov-12-to-Jan-13>