



**FINANCIAL PLANNING  
STANDARDS BOARD**



## FPSB™ Investment Planning Specialist

Are you ready for a world-class learning experience brought to you by Financial Planning Standards Board Ltd., the standards-setting body for the global financial planning profession? Taken either online or with an instructor, FPSB Ltd.'s investment planning course prepares you to develop strategies to optimize your clients' investments considering their risk profile, financial capacity and constraints.

The course teaches you about different types of securities, investment theory and practice, portfolio construction and management, investment strategies and tactics, and securities laws and regulatory compliance. To be recognized by employers, clients and the public for your knowledge and competency in investment planning, complete the roadmap below to obtain FPSB® Investment Planning Specialist certification in India.

### The Roadmap to Certification

#### EDUCATION

- ① **Personal Financial Management**
  - Client Financial Situation
  - Time Value of Money
  - Cash Flow Demands and Conflicts
  - Budget and Emergency Fund
  - Debt and Financing Alternatives
  - Financial Management Strategies
- ② **Investment Planning/Asset Management**
  - Asset Classes and Securities
  - Pooled Investment Products
  - Principles of Investment Risk
  - Investment Performance Management
  - Investment Theory
  - Asset Allocation
  - Wealth Management
  - Behavioral Finance
  - Objectives, Constraints and Suitability
- ③ **Regulatory Environment, Law/Compliance**
  - Client Best Interest
  - Economic Environment
  - Social and Political Environments
  - Compliance and Implications
  - Anti-Money Laundering

#### EXAM

Two hours,  
75 multiple-choice questions



#### EXPERIENCE

No experience needed



#### ETHICS

Five-hour course,  
adherence to FPSB Ltd.'s  
Code of Ethics



**FPSB® Investment  
Planning Specialist**



#### CPD

Five hours annually

Join the Global Community of ~190,000  
**CERTIFIED FINANCIAL PLANNER™ Professionals**

FPSB® Financial Planning Capstone Course

