



The Indian Institute of Financial Planning

For Office Use Only

Student ID:

Session:

Receipt: Rs.

Date: Initial

CFP^{CM} Certification Programme Enrollment Form

(Please read the instructions carefully before
filling up the form)

Paste Your
Photograph
here

1. Name: Mr/Ms

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2. Father's Name

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3. Date of Birth

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4. Nationality

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5. Marital Status: Married

6. Category

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7. Email address:

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8. Correspondence Address:

Locality/Street ----- City-----

State----- Country-----PIN Code-----

Tel. No (with STD Code) ----- Mobile No. -----

Email: -----



9. Permanent Address:

Locality/ Street ----- City-----

State----- Country-----PIN Code-----

Tel. No (with STD Code) ----- Mobile No. -----

10. In Case of Emergency Contact:

Name ----- Relation -----

Tel. No. (with STD) ----- Cell No. -----

11. Qualification Details:

Exam/ Degree	Name of Degree/ Diploma	Marks (%)	College/ Institute	Board/ University	Year of Passing
Professional					
Masters/ PG					
Bachelors					
Sr. Secondary					

12. Current Employment Details:

Service ☐ Self Employed ☐ Not Employed ☐

Company Name: -----

Designation -----

Employed Since

Industry: Finance ☐

Non Finance ☐

Office Address:

City----- State----- Country-----

PIN Code----- Tel. No (with STD Code) -----



13. Work Experience:

Since (Year)	To (Year)	Employer	Department	Designation

14. Delivery Instructions for Course Books/ Study Material. Please deliver:

1. At my Correspondence Address ☐ 2. At my Permanent Address ☐
3. Please do not deliver I will collect personally ☐

15. From which source you came to know about CFP^{CM} Programme:

Internet

Declaration

I do hereby declare that the above information is complete and correct in all respects and I understand that any misrepresentation or information willfully omitted by me is a sufficient ground for rejection of my application by the institute or termination of my enrollment at any point of time and I will not have any claim against the Institute or any of its authorities. Further I undertake to abide by the rules and regulations of the Institute and to accept the terms and conditions of my admission and teaching at the Institute.

Place:

Date:

Signature

Payment Details

1. Fees Paid Rs _____ in Cash or local Cheque No/Draft No _____
Dated _____ Bank name _____
(Payment by local Cheques/ Draft Payable at New Delhi. No outstation Cheque/ draft will be accepted).
2. If fees paid under installment, give details of post dated cheques enclosed.
- | | | |
|------------|------|--------|
| Cheque No. | Date | Amount |
|------------|------|--------|



General Instructions And Terms and Conditions

- The Indian Institute of Financial Planning is an approved Education Provider of Financial Planning Standards Board India for CFP^{CM} Certification Education Programme only.
- Our admission process is open round the year.
- Candidates are required to enroll with us for pursuing the course.
- All candidates are required to apply to the Institute on the prescribed Application form duly obtained from the Institute.
- All columns of the form should be properly filled in. No column should be left blank and if any column is not applicable NA (Not applicable) should be written there.
- Form must be completed in ink preferably with Ball Point pen. Only blue or black ink should be used.
- The application will apply to both CFP and AFP.
- The Institute reserves the right of accepting or rejecting an application at its sole discretion.
- Once admission is granted the Institute will send intimation to the student immediately along with student Registration/ ID number.
- We have limited number of seats in each batch and depending upon the vacancy in each batch a candidate will be accommodated.
- The candidate under normal circumstances will be completing the programme in one year as per the course details and examination schedule of FPSB. Institute will ensure completion of teaching in all modules accordingly. However the candidate can complete the course on his own in a maximum time frame of seven years, including mandatory work experience.
- Full fees will have to be paid along with the completed application form. The candidates can however opt for deferred payment in installments as and when such scheme is announced by the Institute.
- Any tax payable to the government or any increase in tax will have to be borne by the candidate.
- Fees payable are subject to change without notice.
- Fees once paid are non-refundable.
- Registration, Examination fees or any other fee required by the FPSB will have to be paid extra and are not included in fees payable to the Institute.
- Course material will be provided only after the admission of the candidate and realization of fees paid by the candidate. The Institute provides the following study material to students enrolling for the course.
 - (a) Study Material for all 6 modules prepared by eminent academicians and vetted by the industry experts.
 - (b) Exam Oriented Guide with more than 1000 questions especially developed by our in house full time CFP faculties
 - (c) Facility of solving students queries through E-Mail.
 - (d) Investment Analysis & Portfolio Management by Prasanna Chandra
 - (e) Smart Study Series
 - (f) Online Review Guide (Mock Tests)
 - (g) Financial Calculator (Casio FC 200V worth Rs. 1,800/-)

Furthermore, students opting for DLP – Premium are offered the full package of study material as stated above.



Students opting Gold Package are given the whole package of study material & tools excepting Financial Calculator & Online Review Guide.

DLP Silver excludes Financial Calculator, Online Review Guide, Smart Study Series and Investment Analysis & Portfolio Management by Prasanna Chandra.

- Institute will provide all assistance to the candidate in getting his registration with FPSB.
- Admission can also be sought for short term crash course which would prepare the candidate for the examination for obtaining CFP Certification.
- All the above terms and conditions would apply to such admissions as well, except the fee structure, which will be different and as per Institute's decision from time to time.
- The classes of the Institute will be held at 6, Atma Ram Building, 1 Tolstoy Marg, New Delhi. However, the Institute reserves the right to change the venue, should any such requirement arise, without assigning any reason.
- Institute is non-residential and will not be responsible in any way for the boarding and lodging or transport of the candidates.
- Institute has strict rules on discipline and ethics and any candidate found to be infringing those rules/guidelines will be removed without any liability on the part of the Institute.
- Registration with FPSB India is Mandatory for the course.

Note: A copy of the terms and conditions duly signed by the applicant must be attached with the enrolment form.

Signature of Applicant