

Frequently Asked Questions CFP e-CLASS

1. What is CFP e-CLASS programme?

- Certified Financial Planner^{CM} or CFP^{CM} is an international certification programme in the field of financial planning, wealth planning and financial advisory services.
- CFP e-CLASS program is a unique online training offered by ICICIdirect Centre for Financial Learning

2. How is CFP e-CLASS different from classroom training?

CFP e-CLASS is different in the following way:

- It offers the CFP training through the elearn medium. With this a learner can access the training content anytime, anywhere, any day.
- It provides the flexibility to plan the learning activities as per learner convenience i.e. a learner can customize a learning plan for self.
- The learning activity could be spread as per the time convenience of the learner.
- It offers access to online faculty support
- It is learner centric than a trainer specific
- The CFP e-CLASS programme can be repeated multiple times post purchase during subscription period

3. What are of the contents of CFP Regular Pathway and Challenge Status e-CLASS?

CFP Regular Pathway e-CLASS:

- It provides syllabus coverage of all CFP Modules ie from Module 1 to Module 6 (as per revised & updated FPSBI Syllabus, 2013)
- In every module it provides web based content (WBT), audio based training (ABT), internal assessments and online mock tests. In Module 6, it provides more than 15 Case Studies. These case studies help a learner cover almost all topics detailed in FPSB India syllabus. The audio based training and the case studies have been provided and explained by expert academicians and practitioners in personal financial planning

- Once a learner has registered, the WBT & ABT content, recorded case studies can be seen repeatedly any number of times until the expiry of the course access i.e. for 12 months from the date of registration.

CFP Challenge Status e-CLASS:

- It provides syllabus coverage of CFP Module 1 and Module 6 (as per revised & updated FPSBI Syllabus, 2013) to enable a learner to brush up important topics of Module 1 and then to proceed to Module 6 Case Studies.
- It provides more than 15 Case Studies for Module 6. These case studies help a learner cover almost all topics detailed in FPSB India syllabus. These case studies have been provided and explained by expert academicians and practitioners in personal financial planning
- Once a learner has registered, the recorded case studies and Module 1 content (web/audio) can be seen repeatedly any number of times until the expiry of the course access i.e. for 6 months from the date of registration.

4. What is the validity of the programme? And how long can I view the programme once I register?

- CFP Regular Pathway e-CLASS: The course can be viewed any number of times for 12 months from the day of registration. After that the learning id for Online CFP Regular Pathway will expire.
- CFP Challenge Status e-CLASS: The course can be viewed any number of times for 6 months from the day of registration. After that the learning id for Online CFP Challenge Status will expire.

5. What is the eligibility for attending this programme?

- To be eligible for CFP Regular Pathway e-CLASS the learner must be HSC/ 12th pass at the time of enrollment. For more details Please refer website www.fpsbindia.org.
- To be eligible for CFP Challenge Status Pathway e-CLASS the learner requires 3 years work experience in financial Services Industry & 5 years in non-financial services industry. For more details Please refer website www.fpsbindia.org.

6. How would a learner be benefited from CFP Regular Pathway and Challenge Status e-CLASS?

CFP Regular Pathway e-CLASS:

- A learner can read module WBT content or listen to a module ABT, case study or all case studies any number of times within the stipulated time period.

- A learner will have an access to all CFP Modules.
- A learner can start with any module as per individual preference or priority viz a viz learning plan devised or the examination dates taken.
- Online Mock Test of all Modules will help a learner to assess the learning before moving to Module 6 Case Studies.
- Module 6 starts with a primer which helps a learner to understand more about Module 6 and the content coverage.
- Module 6 provides more than 15 case studies –all recorded

CFP Challenge Status Pathway e-CLASS:

- A learner can listen to a case study or all case studies any number of times within the stipulated time period.
- A learner will have an access to Module 1 content in addition to Module 6.
- A learner can start with or revise the concepts of Module 1 as this module forms basis of all other remaining modules. Module 6 case studies could be better understood if Module 1 concepts are clear.
- Online Mock Test of Module 1 will help a learner to assess the learning before moving to Module 6 Case Studies.
- Module 6 starts with a primer which helps a learner to understand more about Module 6 and the content coverage.
- Module 6 provides more than 15 case studies –all recorded

7. What should be the learning flow / learning plan?

CFP Regular Pathway e-CLASS:

- Based on the different needs and exam dates, a learner may customize the learning path for self.
- It further enables a learner to cover the content either over 12 months or to complete at faster pace in just 5-6 months or even lesser.
- It allows the learner to focus more on a given case study and re-visit the specific content any number of times.
- A learner can always reach to an online faculty to help planning a customized learning path.

CFP Challenge Status e-CLASS:

- Based on the different needs and exam dates, a learner may customize the learning path for self. For those having some background in financial planning, moving straight to Module 6 could be the best learning path whereas for other starting from Module 1 and then moving to Module 6 could be the preferred learning path.
- It further enables a learner to cover the content either over 6 months or to complete at faster pace in just one month or even lesser.
- It allows the learner to focus more on a given case study and re-visit the specific content any number of times.
- A learner can always reach to an online faculty to help planning a customized learning path.

8. Are the case studies covered sufficient to pass FPSB India CFP exam?

- Module 6 content provides 15+ case studies divided between two units. One unit provides case studies corresponding to FPSB India syllabus 2013 and the other unit covers case studies module / topic specific i.e. one case study will attempt cover maximum on Module 2: RA & IP whereas other may cover more on Module 3 or Module 4. This approach will help a learner to understand the different modules as well as the comprehensive approach in one case study.

9. Would I get any faculty support?

- **Connect to Faculty** – is an online feature available with the online course access which allows a learner to post the queries to a faculty. The faculty will ensure that the learner gets the query resolution within reasonable time period.
- Further the Online faculty support could be used for all the 6 CFP Modules thus enabling a learner to get maximum support on the CFP syllabus.

10. Will a learner get any other academic support?

- Yes, apart from online faculty support, ICICIdirect Center for Financial Learning (ICFL) has taken a unique step of providing an opportunity to every learner to get the live classroom interaction with ICFL Faculty. This session is termed as **Exam Orientation Session** and would be available on pre-defined calendar basis only at our Centre locations.

- It would be a 2 hr orientation session where a faculty will address all the learners attending from different nearby locations hence it would be one to many / group session.
- An Exam Orientation Session will provide an opportunity to a learner to ask the doubts specific to exam preparation and time management viz a viz FPSBI CFP Regular Pathway and CFP Challenge Status Exam.
- It may not cover the CFP Module specific academic query resolution / doubt sessions.
- A calendar would be available online and the same would also be mailed on respective ids for the exact schedule and location.

11. Why should I enroll for CFP e-CLASS?

- e-CLASS is a great alternative to classroom program. If you have commitment to work, family or extracurricular activity, if you live in an area where there is no ICICIdirect Center for Financial Learning or if your mobility is restricted, it may be difficult to attend classes on a regular basis. e-CLASS provides a best solution to all these issues.

12. What are some of the Challenges when you enroll for e-CLASS?

- One of the key factors for studying through e-CLASS is self discipline. Because you are not required to be in class at a specific time you have to be motivated to do the work on your own. If you have a family or a full time job it is important that establish a schedule for your study.

13. Will I receive a certification after the completion of CFP e-CLASS?

- After successful completion of course, training completion certificate will be provided.

14. If I have registered for CFP e-CLASS. Can I re-schedule /cancel the registration?

- No re-scheduling or cancellation is allowed. Please refer to Terms & Conditions mentioned on the website.

15. What is the program cancellation and fee refund policy for CFP e-CLASS?

- Please refer to Terms & Conditions mentioned on the website.

16. What books will be provided for CFP e-CLASS?

- For CFP Regular Pathway e-CLASS books will be provided for all the 6 Modules.

- For CFP Challenge Status e-CLASS books will be provided for Module1 and Module 6.

17. How will I receive my study material when I register for CFP e-CLASS?

- You receive the study material through courier on your residential address given at the time of registration

18. For employees of ICICI group companies will the CFP e-CLASS program run on ICICI Local Area Network?

- CFP e-CLASS program can be accessed only on external dongle or broad band connection. It will not work on ICICI Local Area Network.

19. How to register Offline?

- To register Offline you need to visit ICICI direct Center for Financial Learning or call us on

Bengaluru: 080 49228916 / 17

Delhi: 011 43251018 / 26

Hyderabad: 040 60020036 /37 / 38 / 39

Mumbai: 022 65900141 /168 / 169

Pune: 020 40009246 / 48

Kolkata: 9230700528

20. Whom do I contact if I have questions about CFP e-CLASS that aren't listed here?

- You can either mail us on learning@icicisecurities.com or call us on the numbers mentioned below.

Bengaluru: 080 49228916 / 17

Delhi: 011 43251018 / 26

Hyderabad: 040 60020036 /37 / 38 / 39

Mumbai:022 65900141 /168 / 169

Pune: 020 40009246 / 48

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