FPSB™ Retirement and Tax 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 retirement and tax planning course prepares you to develop strategies to optimize your clients' wealth accumulation and cash flow leading up to and during retirement, as well as advise on the role of tax planning in supporting client goals.

The course teaches you to consider your clients' personal financial goals, risk tolerance and risk capacity, asset locations, the structure and impact of public and private retirement plans, and how taxation will affect your clients' financial situation and goals. To be recognized by employers, clients and the public for your knowledge and competency in retirement and tax planning, complete the roadmap below to obtain FPSB® Retirement and Tax Planning Specialist certification in India.

The Roadmap to Certification

EDUCATION

1 Retirement Planning

- Retirement Principles
- Retirement Objectives
- Retirement Needs Analysis and Projections
- Sources of Retirement Cash Flow
- Retirement Cash Flow, Withdrawal Projections and Strategies

2 Tax Planning/Optimization

- International Taxation
- Cross-Border and Source Rules
- Tax Strategies
- Accounting Standards and Research

EXAM

Two hours,
75 multiple-choice questions

+

EXPERIENCE

No experience needed

+

ETHICS

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

FPSB® Retirement & Tax Planning Specialist

+

CPD

Five hours annually

Join the Global Community of ~190,000 CERTIFIED FINANCIAL PLANNER[CM] Professionals

FPSB® Financial Planning Capstone Course

FPSB® Investment Planning Specialist

FPSB® Retirement & Tax Planning Specialist

FPSB® Risk & Estate Planning Specialist

CFP[CM]

Financial Planning Standards Board Ltd. owns the CFP[CM], CERTIFIED FINANCIAL PLANNER[CM], ™, FPSB™ and FPSB® marks in India, and permits qualified individuals to use these marks in India to indicate that they have met FPSB's initial and ongoing certification requirements.

Learn more at india.fpsb.org