FPSB

FINANCIAL PLANNING
STANDARDS BOARD

FPSB™ Risk and Estate 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 risk and estate planning course prepares you to develop strategies to manage your clients' financial exposure due to personal risk and preserve and distribute clients' accumulated assets.

The course teaches you to evaluate your clients' legal, tax, financial and insurance position, and the impacts of non-financial issues, to guide clients to conserve and transfer wealth consistent with client 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® Risk and Estate Planning Specialist certification in India.

The Roadmap to Certification

EDUCATION

1 Risk Management

- Principles
- Risk Exposures
- Intro to Insurance
- Insurance Company/Advisor Selection
- Strategic Solutions

2 Estate Planning

- Estate Planning Terminology
- Wealth Distribution Goals
- Estate Planning Process
- Transfer During Life and at Death
- Planning for Incapacity
- Estate Planning Strategies

EXAM

Two hours,
75 multiple-choice questions

+

EXPERIENCE

No experience needed

+

ETHICS

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

FPSB® Risk & Estate Planning Specialist

+

CPD

Five hours annually

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

FPSB® Financial Planning Capstone Course

FPSB® Investment Planning Specialist

FPSB® Retirement & Tax Planning Specialist

FPSB® Risk & Estate Planning Specialist

CFP℠

Learn more at india.fpsb.org