

CFP Syllabus

Module I - Financial Situation Analysis

Know Your Customer (KYC)
Evaluating the Client's Current Financial Situation
Constructing the Personal Financial Profile of the Client
Forecasting the Personal Financial Situation of the Client

Module II- Client Relationship Skills

The Communication Process
Personality Types and their impact on Communication behavior
Cultural Issues in Communication
Client Advisory Relationship Models
Building Trust and Business Ethics

Module III - Risk Management and Insurance Needs

Risk Exposure and Mitigates | Protection
Risk Management over Time
Personal Risk Insurance-Business Risk/Occupational Risks
Property Risk and Mortgage Products

Module IV - Investment Products and Markets

Time Value of Money
Savings and Investments Products
The Fundamentals of Portfolio Management
Client Specific Investment Strategies -linking to Products
The Development of Capital Markets

Module V - Legal Issues in Financial Planning

The Bahamian Legal and Judicial System
Bahamian Taxation Policies
Investment Business Regulations
Products and Services
Policies, Procedures and Business practices

Module VI - Asset Values and Estate Planning

Writing a Will
Pension Planning/Requirements
Planning for Value-Review of Valuation Concepts and Techniques
Valuation of Personal Assets-Developing the Estate Plan

Final Qualifying Exam

The three hour exam will consist of a 150 multiple choice questions.

Course Duration:

7 months

Course Costs \$4,550

(Includes course material, lectures and examination)

Register online at:

www.bifs-bahamas.com