



INTERNATIONAL COLLEGE OF  
FINANCIAL PLANNING  
RULE THE WORLD OF FINANCE

# Post Graduate Diploma in Financial Planning (PGDFP™)

In association with JNTE-CSD, Govt. of Delhi



Powered by  
 **BAJAJCAPITAL**



PGDFP™

# About ICOFP®



International College of Financial Planning (ICOFP®) is India's leading institution in financial education, dedicated to shaping industry-ready professionals. Established in 2002, ICOFP® has been at the forefront of delivering cutting-edge programs that equip students with deep financial expertise and practical skills.

Our flagship programs—Post Graduate Diploma in Financial Planning (PGDFP™), Integrated Diploma in Wealth Management (IDWM), and Registered Financial Prosperity Advisor (RFPA)—are highly valued in the BFSI industry. We don't just create job seekers; we build future financial leaders.

As India's 1st & Largest Premium Partner of FPSB India, ICOFP® offers the globally recognized Certified Financial Planner (CFP®) certification, setting professionals apart in the competitive world of finance

ICOFP® is promoted by the Bajaj Capital Group, one of India's largest premium investment services organizations, serving over 4 million investors in India and abroad for more than six decades.

## Awards and Accolades



## Mission

Being a premier institution for financial education, empowering aspiring professionals with cutting-edge knowledge, industry insights, and practical expertise. We are committed to shaping future leaders who drive innovation, create wealth, and uphold the highest standards of financial excellence in India & abroad.

## Vision

Our vision is to revolutionize financial education by nurturing world-class professionals equipped with the skills and ethical foundation to transform the financial landscape. We aim to bridge the gap between academic learning and industry demands, enabling our graduates to make informed decisions, protect wealth, and contribute to a financially secure future for individuals and businesses worldwide.

## Advisory Board



### Ms. Jaivani Bajaj

Ms. Bajaj completed her graduation in small business management from Delhi University and has done her masters in management with specialisation in marketing with a certification in apparel merchandising and production. She has been involved with operations in the fashion industry since 1995 with varied experience in different facets of the fashion industry, including managing the Indian production facility of a leading export house supplying to some of the top buyers in the U.S. like Nordstrom, T.J. Maxx, J.C. Penney, Dillard's, Wet Seal, and catalogues like Lane Bryant, etc.



### Mr. Sanjiv Bajaj

Sanjiv Bajaj is the Joint Chairman and Managing Director of BajajCapital - a conglomerate having interests spanning in Insurance, Wealth Management, Realty, Personal Finance, Education. He has built the business after taking over the reins from his father Mr. K.K.Bajaj - founder of BajajCapital, and scaled the company to over 300 offices in India with over 4.1 Million clients. Sanjiv Bajaj, who started out in the Business world as a Certified Financial Planner (CFP®), MBA (Finance) also holds an International Certificate for Financial Advisor from the Chartered Insurance Institute (CII) London UK. He was amongst the first batch of 25 CFP® certificates in India.



### Mr. Anil Chopra

Mr. Anil Chopra is the Group Director at Bajaj Capital Limited. He joined the company in 1984. Mr. Chopra has been instrumental in expanding the branch network of Bajaj Capital Ltd. all over India. A Chartered Accountant and a Certified Financial Planner (CFP®), Mr. Chopra is credited with introducing international accounting and HR practices in the organization. His most valuable contribution, however, has been in building up a financially literate society and making Bajaj Capital Group a strong retail brand. He is considered an authority and is widely sought after by the media for quotes on key developments in the industry.



### Prof. Madhu Sinha

Prof. Madhu Sinha, CFP®, is a distinguished leader in the financial planning education sector and author of 2 books, currently serving as the Dean of the International College of Financial Planning (ICOFP®). With a career spanning over three decades, she brings a wealth of expertise, as former director at FPSB India and is also the recipient of Educator of the Year Award (from FPSB India). An accomplished academic and industry expert, she holds multiple qualifications, including B.Com (Hons), CAIIB, PGDFM™, CFP®, and CIWM (Switzerland), along with certifications in various NSE modules.

# Financial Industry

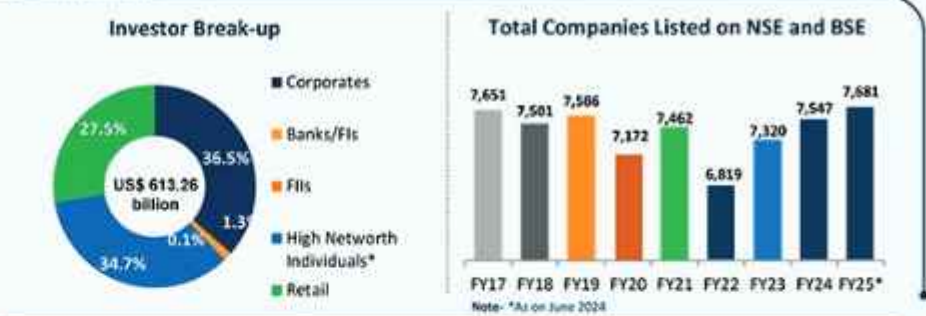
India's financial services industry is experiencing unprecedented growth, making now the perfect time to enter this high-potential field. By 2027, India will have 16.57 lakh HNIs, solidifying its position as the fourth-largest private wealth market globally. The mutual fund industry has already reached ₹66 lakh crore in AUM (US\$ 808 billion) and is projected to grow to ₹90 lakh crore by 2030, while the insurance sector is expanding to \$250 billion by 2025. Additionally, alternative investments such as PMS and AIFs are booming, fueled by regulatory reforms and the rise of GIFT City as a global financial hub. These developments are driving massive demand for highly skilled professionals, creating lucrative career paths in wealth management, investment advisory, private banking, and financial entrepreneurship. With PGDFP™, you don't just join the industry—you position yourself at its forefront.

**MARKET SIZE**



Note: \*As of October 2024

**SECTOR COMPOSITION**



**KEY TRENDS**



# About PGDFP™

The Post Graduate Diploma in Financial Planning (PGDFP™) is not just another business program; it's a high-impact, career-focused qualification designed to give you an unmatched competitive edge in financial services industry. Unlike an MBA, which provides broad business knowledge, PGDFP™ integrates globally recognized certifications like the CFP® designation and SEBI-mandated NISM Certifications, ensuring you post graduate with specialized, job-ready expertise in wealth management, investment advisory, and financial planning.

PGDFP™ goes beyond just preparing you for employment; it acts as a powerful accelerator for your entrepreneurial journey. While regular MBA program teaches management theories and generic curriculum, this program trains you to build and scale your own financial practice, launch a boutique advisory firm, or create innovative investment solutions. With entrepreneurial acumen, investor pitch training, and real-world capstone projects, PGDFP™ empowers you to become a leader—not just an employee—in India's booming financial sector. Whether you aim for a high-paying role in private banking, asset management, or alternative investments (PMS & AIFs) or aspire to be your own boss, PGDFP™ ensures you are not just prepared for the future of finance—you are leading it.

## PGDFP™ Vs. MBA

Feature	MBA	PGDFP™
Duration	2 Years	1 Year (Fast-Track)
Specialization	Generic Management	Focused curriculum on Financial Planning & Wealth Mgmt.
Certifications	Few or None	Incorporates 10+ National & Globally Recognised Certification in PGDFP™ Program
Placement	No Guarantee	100% Placement Assurance
Entrepreneurship Training	Limited	35-Hours Entrepreneurship Training
Industry Interaction	Limited	One-on-One Mentorship with India's Top 10 Financial Planners
Earning Potential	Variable	5 LPA+ Assured

While a traditional MBA provides broad management skills, PGDFP™'s specialized curriculum hones in on financial planning and wealth management, ensuring you're not just another business graduate, but an expert in an industry that's experiencing explosive growth. With industry certifications, guaranteed placement assurance, and tailored mentorship from leading financial planners, PGDFP™ offers a direct pathway to becoming a sought-after professional in the financial services sector.

# Program Overview



The objective of the program is to nurture future leaders who aspire to make a distinctive mark in the Banking, Financial Services, and risk management (BFSI) industry. Through a meticulously designed curriculum, participants gain mastery over the entire spectrum of technical qualifications and skill sets required to excel in verticals such as insurance, mutual funds, private banking, financial planning, and advisory services. The program also instills entrepreneurial acumen, empowering candidates to innovate, strategize, and lead in a rapidly evolving financial landscape. Additionally, it includes the full curriculum of the prestigious **CERTIFIED FINANCIAL PLANNER (CFP®) certification**, enabling participants to achieve this global designation while driving meaningful impact in a dynamic and competitive financial ecosystem.



# 10 Reasons Why You Should Join PGDFP™



**1 20+ Years of Legacy** 

Join a program with a proven track record in financial education and career transformation.

**2 100% Guaranteed Placement** 

Secure a job with top financial firms like Bajaj Capital, Mirae Assets, Ameriprise, Axis Bank, SBI Bank, & more.

**3 Earning Potential** 

Start your career with a ₹5 LPA+ package in wealth management, investment advisory, and financial planning.

**4 10 Certifications in 1 Program** 

Get globally recognized CFP® certification + 8 SEBI-mandated NISM certifications for a competitive edge.

**5 Industry-Driven Curriculum** 

PGDFP™ curriculum is crafted by financial experts and closely aligned with corporate hiring needs, ensuring you are job-ready from day one. It doesn't just prepare you for a career in financial planning; it also provides the tools, knowledge, and resources to launch your own financial planning firm.

**6 3 Months Online + 8 Months on Campus** 

The perfect blend of flexibility and immersive learning.

**7 Paid Internship Alongside Your Classes** 

Get the best of both worlds! During the 8-month paid internship (₹15,000/month), you'll learn in the classroom, earn a stipend, and apply your skills in real-time at one of India's leading financial services firms — Bajaj Capital Ltd.

**8 Cutting Edge Entrepreneurship Module** 

Receive comprehensive training on starting and scaling your own financial planning firm, including business strategy, client acquisition, financial product positioning, and operational management, empowering you to become a successful financial entrepreneur.

**9 Guest Lectures From Industry Experts** 

Imagine learning directly from India's top financial leaders and wealth managers who've shaped the industry with their years of expertise. These guest lectures give you a front-row seat to real-world financial wisdom.

**10 One-to-One Mentorship** 

Experience exclusive, personalized guidance from India's leading financial planners. This mentorship goes beyond the basics, giving you hands-on advice on how to launch your own financial advisory business, the real-world challenges top industry leaders face, and the proven strategies they use to build successful, sustainable careers in finance.

# PGDFP™ Course Curriculum

## Study Modules ● ● ●

1

### Core Financial Planning Knowledge

Covers financial fundamentals, investment planning, tax & estate planning, retirement planning, and risk analysis.

2

### Professional Certifications

Includes industry-recognised certifications like CFP® Certification, NISM Mutual Fund, Investment Adviser Levels 1 & 2, Equity & Currency Derivatives, and AIF & PMS Distributors

3

### Emerging Trends & Specialized Expertise

Covers behavioural finance, sustainable finance (ESG), data analytics with AI, digital assets (cryptocurrency), and technical analysis.

4

### Industry & Compliance Knowledge

Focuses on regulatory frameworks, compliance laws, and product training workshops

5

### NLP & Relationship Management

Enhances interpersonal skills and communication using NLP, focusing on negotiation, persuasion, and leadership for strong professional relationships.

6

### Entrepreneurship

Covers financial practice setup, client acquisition, pricing, tech integration, branding, and investor pitching, with a live business plan review by experts.

7

### Real-World Wealth Management Project

A real-world project requiring students to create a holistic financial plan and submit a detailed report

8

### Advanced Financial Planning & Case Studies

Through real-life case studies and deep-dive simulations, you'll learn how to assess a client's full financial picture, prioritize goals, and craft winning strategies.

9

### Stock Market Mastery

Learn technical and fundamental analysis, helping you decode stock movements, analyze trends, and make informed decisions. From equity to derivatives, you'll gain the skills that top market analysts use in the market

10

### Tech-Driven Learning

Blockchain, AI, and Data Analytics for modern finance. Gain cutting-edge insights and skills for the future of financial technology and innovation.



## Additional Certifications along with PGDFP™ Program @ ICOFP®



- CFP® Certification ( Incorporates CFP® Level 1, 2, 3 & 4 curriculum)
- Mutual Fund & Investment Alternatives (NISM VA)
- Investment Adviser (Level 1) Certification Examination (NISM XA)
- Investment Adviser (Level 2) Certification Examination (NISM XB)
- Securities Market Foundation Certification Examination (NISM:XII)
- Equity & Currency Derivatives (NISM VIII)
- AIF (Category I and II) Distributors Examination (NISM XIX-A)
- PMS Distributors Certificate Examination (NISM XXI-A)
- Research Analyst Certification Examination (NISM XV)
- Post Graduate Diploma in Financial Planning (PGDFP™) awarded by JNTE-CSD, Govt. of Delhi
- Advanced Diploma in Financial Planning and Entrepreneurship

Earning globally recognised CFP® Certification & SEBI NISM certifications equips individuals with specialized knowledge in financial planning, investment advisory, wealth management and market analysis, making them highly valuable in the financial services industry.

By acquiring these industry-certifications, individuals can accelerate career growth, enhance earning potential, and establish themselves as competent and trustworthy financial experts in an ever-evolving financial domain.



# FINANCE

# Career Opportunities



The Post Graduate Diploma in Financial Planning (PGDFP™) opens the door to a wide range of career opportunities in the financial services industry. This program equips students with in-depth knowledge of financial planning, investment strategies, risk management, taxation, and wealth creation. With the increasing demand for certified financial professionals, PGDFP™ graduates can pursue rewarding roles in banking, wealth management, corporate finance, and financial consultancy. Here are some of the top career opportunities after completing the PGDFP™ program

- 1**

**Financial Planner**

Help individuals to create comprehensive financial plans, manage investments, and achieve long-term financial goals.
- 2**

**Wealth Manager**

Work with high-net-worth individuals (HNIs) to manage their wealth, optimize investments, and provide tax-efficient strategies.
- 3**

**Investment Advisor**

Guide clients on investment options such as mutual funds, stocks, bonds, and real estate for optimal portfolio growth.
- 4**

**Risk Analyst**

Assess financial risks for individuals and businesses, ensuring they make informed decisions to protect their assets.
- 5**

**Portfolio Manager**

Manage investment portfolios for clients, institutions, balancing risk returns effectively
- 6**

**Retirement Planning Consultant**

Assist clients in structuring their retirement funds to ensure financial security post-retirement.
- 7**

**Private Banker**

Handle financial planning, risk assessment, and strategic investment decisions for corporations.
- 8**

**Personal Tax Consultant**

Provide tax planning strategies, ensuring clients maximize savings and comply with financial regulations.
- 9**

**Technical / Derivative Analyst**

Analyze market trends, identifies trading opportunities, and supports investment decisions using charts and data

# Placement Partners




# Students Testimonials



**Shubham Maheshwari**  
(PGDFP Batch 2012)  
Area Sales Manager - Baroda BNP  
Paribas Asset Mgmt Pvt LTD

ICOFP laid the foundation for my success in finance. The PGDFP program (2012), guided by Indranil Sir & Tapas Sir, shaped my career and led to my first job. The perfect launchpad for aspiring finance professionals!



**Karishma Jain**  
(PGDFP Batch 2016)  
Co-Founder - Bulls Vision  
Fintech India Pvt. Ltd.

Completing my PG Diploma in Financial Planning from ICOFP in 2016 was a game-changer. The expert faculty, industry-focused curriculum, and practical learning shaped my career, helping me co-found Bulls Vision Fintech India. If you're serious about financial planning, ICOFP is the place to be!



**Puttaswamy B. Gowda**  
(PGDFP Batch 2012)  
Co-Founder - Fino voice freedom  
LLP

ICOFP's PGDFP program (2014) was a game-changer, laying the foundation for my career in personal finance. Today, I run multiple firms, including Fino Voice Freedom LLP, and have authored Your IQ is Not Equal to Your FQ. This practical course is the perfect launchpad for aspiring finance professionals—whether as employees or independent practitioners



**Rajat Sharma**  
(PGDFP Batch 2016)  
Regional Head - Nippon India  
Mutual Fund

I can't thank ICOFP enough for giving me the necessary knowledge to start out in the Financial Industry from an RM to a Regional Head to in one of India's biggest Mutual Fund House. I couldn't not have imagined this incredible journey without ICOFP . Rajat Sharma - Nippon MF



**Pritam Bhattacharjee**  
(PGDFP Batch 2012)  
Branch Manager - SBI Funds  
Management

ICOFP provided me with exceptional academic and career development support. The faculty's guidance was invaluable. Today, with 12 years in banking & finance, I serve as a Branch Manager at SBI Funds Management



**Sushen Saha**  
(PGDFP Batch 2016)  
Co-Founder - Bulls Vision Fintech  
India Pvt. LTD.

My success in the financial industry began at ICOFP. The transformative PGDFP program in 2012, along with the invaluable guidance from Indranil Sir and Tapas Sir, shaped my career. The skills I gained led to my first job and continue to impact my growth. For aspiring finance professionals, ICOFP is the ideal launchpad.

## Eligibility

**PGDFP™ program is targeted towards individuals with high potential for success in the financial services sector. Selection at ICOFP® is therefore rigorous and competitive.**

The Candidate must possess a Bachelor's Degree in any stream.

The Bachelor's Degree (or equivalent qualification with minimum of 50%) obtained by the candidate must entail a minimum of 3 years of education after completing Higher Secondary School (10 + 2 or equivalent).

Candidates applying for their final year exams can also apply subject to furnishing a proof of graduation before joining the program.

**ICOFP® Prospectus and Application Form and can be acquired by one-time payment of Rs. 500/- for one program.**

By cash payment at our counselling office in Okhla, New Delhi

By post (enclosing demand draft drawn in favor of "International College of Financial Planning Ltd." payable at New Delhi).

On-line application through <https://icofponline.com/easypayonline.aspx> (make the payment by UPI/credit/debit card).

## Admission Test



Candidates are required to appear for AMCAT / PMAP (computer based adaptive test which measures critical areas like communication skills, logical reasoning, quantitative skills, thus helping us to identify the suitability of a candidate.) conducted by International College of Financial Planning. All candidates who have appeared for CAT/ MAT can also apply to ICOFP® with their score. Short listed candidates will have to appear only in a Personal Interview. The overall objective is to identify and assess the candidate's communication ability, in addition to the overall knowledge of the student.

## Admission Offer



Final selection will be based on a careful evaluation of the applicant's academic record from class X, through graduation and/or post graduate qualification, work experience (if any), extra curricular activities, and personal Interview. Successful candidates will be informed of their final selection by courier/ phone call. The selected candidates must pay their first fee installment within two weeks of receiving the admission offer, failing which the offer will be withdrawn.



PGDFP™ Course Fee	
Registration Fee	₹500/-
Course Fee	₹3,50,000/-
Down Payment at the Time of Admission	₹50,000/-

Students can also avail financing options through our NBFC loan partner, with loan tenure options of 12 months and 24 months.

***Please note that Additional CFP® + NISM certification fees are over and above the PGDFP™ course fee, to be paid directly to the board or examination body.***



## International College of Financial Planning

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