

CHALLENGE STATUS REGISTRATION FORM

Before filling the Challenge Status (CS) Registration Form kindly make sure:

- You have taken NCFM Number from the NSE Website
- You have finalized the Challenge Status Route you would like to register through for the Challenge Status Pathway to pursue CFP Certification
- If you are opting to make the payment by Demand Draft kindly make sure you have drawn the DD and have the DD details.

Registration Details

Kindly note you will not be able change your NCFM Number after submission of the Form. A student must submit the print out of this Form to the Education Provider/ FPSB India.

NCFM Number NCFM -

CS Route (Tick the route Financial Planning Standards Board India
through which you are IIBF's Post Graduate Diploma in Financial Advising
applying for Challenge Education Provider _____
Status Program) Charter Member _____

Login Details

Students can login through the FPSB India Website and avail Login facilities. Kindly provide us with three preferences for user name. If none of the below user names are available, the EP or FPSB India will choose one for you and communicate the same.

Preferred 1) _____ 2) _____ 3) _____

Personal Details

Salutation _____ Gender: Male Female Date Of Birth

First Name _____

Middle Name _____

Last Name _____

Contact Details

Kindly make sure you fill the contact details correctly. FPSB India will send all the important notifications relating to the CFP Certification Program to the details given below.

Email-id 1 _____ Email-id 2 _____

Mobile Phone _____ Resident No. _____ Business No. _____

Correspondence Address

Address _____

State _____

City _____

Pin Code _____

Permanent Address (Same as Correspondence Address)

Address _____

State _____

City _____

Pin Code _____

Education Details

| Level of Education | Graduation/ PG Degree | Institute Name | Discipline/ Specialization | Year of Completion | Percentage% |
|--------------------|--------------------------|----------------|-------------------------------|-----------------------|-------------|
| Std X/SSC | _____ | _____ | _____ | _____ | _____ |
| Std XII/HSC | _____ | _____ | _____ | _____ | _____ |
| Graduation | _____ | _____ | _____ | _____ | _____ |
| Post Graduation | _____ | _____ | _____ | _____ | _____ |

Kindly attach the Graduation Certificate while submitting the Form.

Current Employment Details

| | |
|--|---|
| <input type="checkbox"/> I am a Corporate Employee Name of the Organization _____ Designation _____ Sector/Industry (Tick any one) <input type="checkbox"/> Insurance <input type="checkbox"/> Financial Advisory/Planning <input type="checkbox"/> AMC <input type="checkbox"/> Equity Broking <input type="checkbox"/> Distribution Houses <input type="checkbox"/> Banking Others _____ Total Number of Work Experience: <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> | <input type="checkbox"/> I am Self-employed Name of the Organization _____ Designation _____ Product/Services Offered (Tick whichever applicable) <input type="checkbox"/> Mutual Fund <input type="checkbox"/> Life Insurance <input type="checkbox"/> Stock Broking <input type="checkbox"/> Tax Advisory <input type="checkbox"/> General Insurance <input type="checkbox"/> Banking Products Others _____ Total Number of Work Experience: <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> |
|--|---|

Professional Qualifications Eligible for Challenge Status Pathway

Kindly select the qualification attained by you under which you are applying for the Challenge Status Program and attach the attested photocopy of the certificate while submitting the Form.

- Chartered Accountant (CA) from Institute of Chartered Accountants of India (ICAI)
- Chartered Financial Analyst (CFA) from CFA Institute, USA
- Cost Accountant (ICWA) from the Institute of Cost and Works Accountants of India (ICWAI)
- Certified Associate of Indian Institute of Bankers (CAIIB)
- Ph.D./ M.Phil in Economics, Econometrics, Statistics, Commerce, Mathematics, Finance, Management, Financial Planning/ Advising, Investment (or any other similar discipline)
- Post Graduate in Economics, Econometrics, Statistics, Commerce, Mathematics, Finance, Management Financial Planning/ Advising, Investment (or any other similar discipline)
- LLB (Law)
- Licentiate/Associate/ Fellowship of Life Insurance from Insurance Institute of India
- Actuary from Institute of Actuaries of India
- Civil Service Examinations by Union Public Service Commission (UPSC)
- Company Secretary from Institute of Company Secretaries of India.
- Fellow, Financial Services Institute (FFSI) / Fellow, Life Management Institute (FLMI) from LOMA

Additional Certifications

AMFI IRDA Other Certifications _____

Qualifying Work Experience

Enter your current employment details the first row and previous employment details in the following rows chronologically.

| Nature of Employment (Corporate or Self-employed) | Name of the Organization | Designation | No. of months |
|--|--------------------------|-------------|---------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Kindly enter details of your work experience which qualifies for applying for the Challenge Status Program and attach the attested photocopy of the experience certificate while submitting the Form.

Payment Details

Kindly note payment once made is non-refundable and non-transferable. Candidates opting to pay using Demand Draft need to attach the demand draft while submitting the Form to Education Provider/ FPSB India.

Challenge Status Program Fees

| CS Route | Fees (in Rs.) | CS Route | Fees (in Rs.) |
|---|---------------|---|---------------|
| FPSB India | 25000/- | Education Provider | 20000/- |
| IIBF's PG Diploma in Financial Advisory | 20000/- | Charter Member (Extended Special Offer) | 5000/- |

Credit Card

Please charge my Credit Card  

for Rs. _____*

Card member's name _____

Card No. _____

Card Expiry Date _____

*(Processing Fee of 2.5% will be added for credit card payments) Signature _____

Demand Draft

Please find enclosed DD (payable at Mumbai) of Rs. _____

favouring "Financial Planning Standards Board India"

DD Number _____

DD Date _____

City/Branch Name _____

Declaration

I shall submit the following documents to FPSB India/Education Provider (as applicable) selected above within 15 days from today failing which I understand that my application for Challenge Status Registration will not be considered by FPSB India.

- Print out of Challenge Status Registration Form
- Passport size Photo
- Demand Draft (if opted for in the Payment Option above)
- Graduation Passing Certificate (Attested)
- Professional Qualifications Certificate as applicable (Attested)
- Additional Certifications Certificate as applicable (Attested)
- Work Experience Certificate (Attested)

(Note: All the attestations as mentioned above are to be attested by a Gazetted Officer if Self Employed or by the Head of HRD of current employer if Employed.)

I certify that the above information provided by me is true and correct to the best of my knowledge, information and belief. I also agree to adhere to FPSB India guidelines and instructions. I accept that all decisions pertaining to the Education, Examination & Certification shall be final and binding on me.

Name _____

Place _____ Date _____

Signature _____

SPECIAL DECLARATION FORM

The Special Declaration must be signed by recommending authority/organization of the applicant's employer represented by Head of HRD or by a Gazetted Officer if the applicant is self employed.

Name _____

Position _____

Organisation _____

Email ID _____

Telephone _____

(Please attach your Business Card)

I confirm that (Name of the CFP Applicant) _____ is

- Engaged in an executive position leading the organization/team rendering Financial Planning advise/education to clients in accordance with the FPSB India's six step Financial Planning process.
- Full time engaged in a position where he/ she actively uses Knowledge, skill and ability to provide, or directly supervise the provision of comprehensive financial planning advice to clients in accordance with FPSB India's six step Financial Planning process, and has performed the above service for two or more years, including six months in the last twelve months.
- Engaged in an associated field or work (eg. accounting, banking) and provides a comprehensive financial planning service to clients, representing at least 20% of the working week (i.e. part time), in accordance with FPSB India six step Financial Planning process, and has performed the above functions for two or more years, including six months in the last twelve months.

Name _____

Place _____ Date _____

Signature