



For Office Use Only

Branch / Date

Enrollment ID

CFP<sup>CM</sup> / AFP CERTIFICATION EDUCATION PROGRAMME

Please read the instructions given at the end carefully before filling the form. Please use capital letters

ENROLLMENT FORM

Course Applied for: AFP  CFP<sup>CM</sup> Regular Programme  Challenge Status

Please mention the modules  
(Applicable only for AFP)

- 00. Introduction to Financial Planning
- 01. Risk Analysis & Insurance Planning
- 02. Retirement Planning & Employee Benefits
- 03. Investment Planning
- 04. Tax & Estate Planning
- 05. Advanced Financial Planning

Paste your  
Recent Color  
Passport Size  
Photo

(Introduction to Financial Planning is compulsory module)

Note: there would be no separate exam for Module 1 i.e. Introduction to Financial Planning

NCFP Number-

Prefix: Mr.  Ms.  Mrs.  Dr.

Name: .....

Father's / Guardian's Name: .....

Date of Birth: Day ..... Month ..... Year .....

Nationality: .....

Marital Status: Single  Married

E-mail address: .....

Correspondence Address: ..... City: .....

State: ..... Country: ..... Pin Code: .....

Mobile No: ..... Phone Number (STD Code): .....

Check if the permanent address is same as correspondence address, otherwise fill below:

Permanent Address : ..... City: .....

State: ..... Country: ..... Pin Code: .....

Mobile No: ..... Phone Number (STD Code): .....



Qualification Details:

Exam/Degree	Name of degree/diploma	Percentage (%)	College/Institute	Board/University	Year of passing
Sr. Secondary					
Bachelors					
Masters					
Professional					

Current Employment Details: Service  Self-employed  Student

Company Name: ..... Designation: .....

Industry: Finance  Non-finance  Employed since: .....

Office Address  
..... City: .....

State: ..... Country: ..... Pin Code: .....

Phone Number (STD Code): ..... Fax Number (STD Code): .....

Past experience:

Since	To	Employer	Department	Designation

Total years of experience ..... In finance industry ..... In non-finance industry .....

If any of the following statements is marked 'yes' kindly set forth the principal facts relating to each incident in the space provided against each question. You may be required to provide copies of appropriate documentation such as claims, complaints, answers, decisions, settlements, proof of fines etc.

Have you ever been charged or convicted in a court of law, or are there any pending charges?

Yes  No  Details .....

Have you had a business related license, registration or membership revoked, denied or suspended?

Yes  No  Details .....

Are you an un-discharged bankrupt or ever been declared bankrupt?

Yes  No  Details .....



Have you been refused membership of a statutory professional or other body in respect of your professional capacity?

Yes  No  Details .....

Have you been subject to disciplinary proceeding or expelled by a statutory professional or other body in respect to your professional capacity?

Yes  No  Details .....

Have you ever been dismissed or had a proper authority or life insurance agency withdrawn on ethical or legal grounds?

Yes  No  Details .....

Have the past or pending claims been made against your professional indemnity insurance in relation to financial advice?

Yes  No  Details .....

From which source did you learn about CFP<sup>CM</sup> Education Programme (Details .....

Company  Friends  FPSB, India  Seminar  Website

**DECLARATION**

I hereby declare that the above information is complete and correct and I understand that any misrepresentation or missing information is sufficient grounds for rejecting my application. I understand and agree to abide by the withdrawal policy, copyright protection, and other terms and conditions stated in paras 1 to 17 of General Instructions - Terms & Conditions.

Place :  
Date :

Signature

**PAYMENT DETAILS**

Kindly fill in the following payment details:

- (A) FPSB, India, Registration Fees Rs. ....
- (B) Examination Fees Rs. ....
- (C) KNI's Registration fees Rs. ....
- (D) KNI's Course fees for Module
  - 00. Introduction to Financial Planning
  - 01. Risk Management & Insurance Planning
  - 02. Retirement Planning & Employee Benefits
  - 03. Investment Planning
  - 04. Tax & Estate Planning
  - 05. Advanced Financial Planning
- (E) Total (C+D) Rs. ....
- (F) S. Tax (10.03%) on (E) Rs. ....
- (G) Total Fees Payable (A+B+E+F) Rs. ....

via Cash  Demand Draft

(DD should be in the name of "Knowledge Network India Pvt Ltd")

DD No: ..... Dated: ..... Drawn on: .....

**FOR OFFICE USE ONLY**

Date: .....

Received by: .....



(Please attach deposit slip)

### **GUIDELINES TO COMPLETE THE REGISTRATION FORM**

The students are advised to read the following guidelines carefully before completing the Registration Form.

- The Application Form should be filled in capital letters
- Ensure that the application form is completely filled up before submission.
- Ensure that the Application Form is signed.
- Along the KNI-AIF Registration Form you also have to Submit the Print out of FPSB Registration Form (Registration with FPSB is mandatory).
- Filling the application form will register you both the KNI for AFP/CFP<sup>CM</sup> certification programme and as a student in FPSB.
- The FPSB Registration Fee for the program is to be remitted along with the application form at the time of enrollment to KNI. FPSB India accepts only demand draft of any commercial bank, drawn in favor of “**Financial Planning Standards Board India**” payable at Mumbai.
- Govt. Taxes (like Service Tax) extra as applicable during tenure of the programme. Programme fees are subject to change in taxation laws.

**Enclosures:** Please ensure that your application contains the following enclosures.

1. Registration Form for Admission into the program (with recent two color photograph)
2. Account payee Demand Draft towards the fee in favor of “**Knowlege Network India Pvt. Ltd.**” (Please note there is no “d” in Knowlege) payable at Gurgaon.
3. Attested (by Gazetted Officer or by HRD Department of current employer) copy of STD XII / Equivalent Pass Certificate.
4. For challenge status candidate, attested copy of their professional qualification and the copy of experience certificate should be enclosed.