

### **FPSB India Registration process:**

1. Fill the student registration form at [www.fpsbindia.org](http://www.fpsbindia.org)
2. Make the payment (We also urge you to pay the FPSB Registration Fee by Credit or Debit Card online. This will speed up your registration process.
3. Upload the documents at [www.proschoolonline.com/](http://www.proschoolonline.com/)
4. Get confirmation from FPSB India within 10 days through email or sms (from the date of uploading the documents) or you can check it at [www.fpsbindia.org](http://www.fpsbindia.org) with your user id and password

**To complete the above formalities refer to the screen shot below**

Please keep the following things ready to fill the form:

- NCFM ID (If you don't have NCFM ID, then please create one - To know how to create NCFM refer "How to create NCFM ID" document at FAQs )
- Scan copy of Photograph
- Scanned Copy of Highest Qualification Certificate or Marksheet (minimum XII std)

Visit to [www.fpsbindia.org/](http://www.fpsbindia.org/)

The screenshot shows the FPSB India website in Internet Explorer. The browser address bar displays <http://www.fpsbindia.org/>. The website header includes the FPSB India logo and the text "FINANCIAL PLANNING STANDARDS BOARD INDIA". A navigation menu contains links for "About Us", "CFP<sup>™</sup> Certification", "Publications", "Events", "Education Providers", "Media Room", and "CFP<sup>™</sup> Certificant Directory".

The main banner features a globe and the text: "Enhanced Competency... fulfill the rigorous 4E certification standards". Below the banner, there are three image-based sections: "Download Forms", "Pathway to CFP<sup>™</sup> Certification", and "Financial Institutions". A yellow arrow points to the "Student Registration Form" link in the "Financial Institutions" section.

The "Quick Links" sidebar on the left lists: "Download Forms", "Pathway to CFP<sup>™</sup> Certification", "Financial Planning Basics", "Financial Planning Journal", "Examination Structure", and "FPSB India Address & Location Map".

The "What's New" section contains a link: "Notification-Spreadsheet at NSEIT Test Centres".

The footer of the browser shows the system tray with the date "07-Aug-10" and time "1:58 PM".

Fill the required details

## Student Registration Form

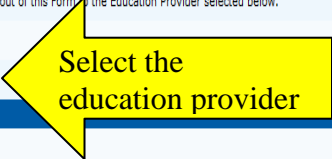
Before filling Student Registration Form kindly make sure:

- You have taken NCFM Number from the [NSE Website](#)
- You have finalized the Authorized Education Provider you would like to enroll for the CFP Certification Education Program

### Registration Details

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

NCFM Number (11 digits) \*

Name of the Education Provider \*  

### Login Details

Students can login to the FPSB India Website and avail Login facilities using the Login ID and Password created below.

Login ID \*  [Check Availability?](#)

Password \*  Re-type Password \*

### Personal Details

Salutation \*  Gender \*

First Name \*  Middle Initial  Last Name \*

Date Of Birth \*

Upload Photo

If you do not have soft copy of photo, kindly submit a Passport Size Photo along with this Form as attachment

### Contact Details

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

Email-id 1 \*  Email-id 2

Mobile Phone \*  Residence No. (Pls prefix area-code)  Business No.

### Correspondence Address

Address \*  Permanent Address (  Same as Correspondence Address )

State \*  State \*

-- Post Graduation --

Kindly attach any one of the Education Passing Certificate.

### Current Employment Details

Nature of Employment \*

### 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 print out of the Form to Education Provider.

(Processing Fee of 2.5% will be charged for online payments)

Base Fee	Processing Fee	Total Fee
Rs. 10000.00	Rs. 0.00	Total Fee Rs. 10000.00

Online Payment (Credit Card/Debit Card)  Offline Payment (Demand Draft)

DD Number \*  Bank Name \*

DD Date \*  City/Branch Name \*

I shall submit the Demand Draft to FPSB India within 15 days from today failing which I understand that my application for Student Registration will not be considered by FPSB India.

### Declaration

I shall submit the following documents to the Education Provider selected above, or to FPSB India in case of Self Study mode within 14 days from today failing which I understand that my application for Student Registration will not be considered by FPSB India

- Duly filled Student Registration Form
- Passport size photo
- Education Passing Certificate (Attested)
- Demand Draft (if opted for in the Payment Option above)
- Marriage Certificate or Pan Card /Passport Copy in case of change of name after marriage

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.

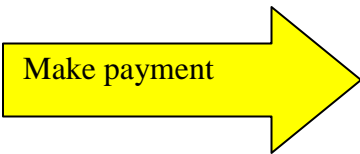
### Image Verification

Enter Verification Code \*

(Note: If you can not see the code, click on the refresh button to get a new one.)

Enter the code as shown in above image:

Submit the form





**AXIS BANK**

Merchant name: FINANCIAL PLANNING STANDARDS BOARD, INDIA

Select your preferred payment method

Pay securely using SSL+ by clicking on the card logo below:

Copyright ©2007 Dialect Payments Pty Ltd. All Rights Reserved.

SECURE PAYMENTS POWERED BY DIALECT

Done Internet | Protected Mode: On 100%

**FPSB INDIA**  
FINANCIAL PLANNING STANDARDS BOARD INDIA

**OCMS**  
Online Certification Management System  
FPSBI Website

**Send the documents to Education Provider**

**Student Registration Form Submitted Successfully!**

We have sent you an email with registration and login details.

Kindly submit to your Education Provider the following documents:

1. Print Out of the Student Registration Form. **Print Form**
2. Education Passing Certificate
3. Passport Size Photo (if not submitted online)
4. Demand Draft in the name of "Financial Planning Standards Board India"

FPSB India will intimate you through email/SMS once your Student Registration is activated. You can start enrolling for Examinations(Exam 1,2,3,4)60 days after the activation. Login using your Login ID & Password on FPSB India Homepage to manage your online account. **Login Now!**

Done Internet | Protected Mode: On 100%

Note:

1. If you are making online payment, then upload the following documents at [www.proschoolonline.com](http://www.proschoolonline.com) (refer below screenshots)
2. If you are making payment through demand draft then send your DD and documents (copy of marksheet & photograph) at:

To,  
CFP Exam Co-ordinator  
**IMS Proschool Pvt Ltd,**  
Maharashtra High School Complex,  
Principal N.M Kale Marg, Gokhale Rd,  
Dadar (W), Mumbai 400028  
**Tel. No.:** 022-65285393/94 & 9920469336

How to upload documents at [www.proschoolonline.com/](http://www.proschoolonline.com/)

The screenshot shows the Proschool website interface. The main navigation menu includes Home, Certificate Programs, Corporate Programs, and Contact. The page content is organized into several columns:

- About Proschool:** Links to About IMS Proschool, Proschool Programs, and Who should join Proschool?
- Live Virtual Class:** Links to Schedule of upcoming batches and Request to attend a Demo Class.
- News and Announcements:** Links to Renew your CFP Course Material and FM Students: View the Final Exam Registration Calendar.
- Our Clients:** Features the Uti Mutual Fund logo.
- Proscool Home:** Describes the practical financial skills training courses and lists programs like Financial Modeling, Financial Planning, and Financial Services Marketing. It also mentions Chartered Financial Analyst (CFA) and Financial Services Marketing.
- Important Links:** Includes Enroll Now, FAQs, Get the Application Form, Locate a Centre, Request Additional Information, and Testimonials.
- Queries?:** Features a chat box for 'Chat with ronojoy mishra' (Offline).
- Student Login:** A section titled 'Log into our Learning Management System.' with fields for Username (ankush) and Password (masked with dots), and a Login button.
- Proscool Certificants:** A section for graduates.

A yellow arrow points from the text 'Log into "learning management system"' to the Student Login section.

Advanced Financial  
Planning  
Teacher: sameer gunjal

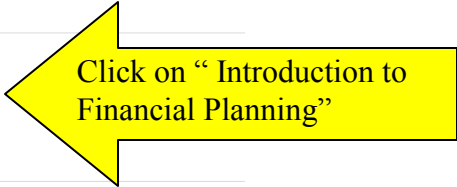
Investment Planning  
Teacher: sameer gunjal

Tax & Estate Planning  
Teacher: sameer gunjal

Retirement Planning &  
Employees Benefits  
Teacher: sameer gunjal

Risk Management &  
Insurance Planning  
Teacher: sameer gunjal

Introduction to Financial  
Planning  
Teacher: sameer gunjal  
Teacher: Poonam  
Deshmukh



Course: Introduction to Fin... x

http://www.proschoolonline.com/moodle/course/view.php?id=29

# Proschool Online

You are logged in as Ankush Bhandari (Logout)

proschoo... > CFP10-IFP

Switch role to... Turn editing on

**People**

Participants

---

**Search Forums**

Go

Advanced search ?

---

**Administration**

- Turn editing on
- Settings
- Assign roles
- Grades
- Groups
- Backup
- Restore
- Import
- Reset

**Topic outline**

- Study Support & Help from Proschool
- Additional Web Resources
- Upload Your FPSB Registration Documents
- Question and Answer Forum
- Upload Resume
- Share your resources

**1 Financial Planning Process (To be completed in Week 1)**

- Establishing Client - Planner Relationship
- Gathering Client Data and determining goals and expectations
- Analyse Client Objectives, Needs and Financial Situation
- Developing appropriate strategies and presenting the Financial Plan
- Implementing the Financial Plan
- Monitoring the Financial Plan
- Assessment of Risk & Client Behaviour
- Unit Test 1

**2 Regulatory Standards & Ethics (To be completed in Week 1)**

- Ethical and professional considerations in Financial Planning
- Unit Test 2

**Upcoming Events**

- Live Virtual Class  
Tomorrow, 07:50 PM  
» 11:15 PM
- Live Virtual Class  
Thursday, 12 August, 07:50 PM  
» 11:15 PM
- Live Virtual Class  
Monday, 16 August, 07:50 PM  
» 11:15 PM

Go to calendar...  
New Event...

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**My Connects**

Compose a Mail

Click on "Upload your FPSB Registration documents"

http://www.proschoolonline.com/moodle/mod/resource/view.php?i...

start Google CF... My... FP... re... In... FP... Co... 9:04 PM

CFP10-IFP: Assignment: U... x

http://www.proschoolonline.com/moodle/mod/assignment/view.php?id=1113

1. Keep all your files ready in a folder
2. Click "Browse" button below and Click on Upload file to upload your first file
3. Repeat the same process for upload all other files
4. You can upload maximum of 3 files (FPSB Registration form, Highest Qualification Marksheet or Certificate, Photograph)
5. Maximum size of all documents put together must be less than 2MB
6. After you have uploaded all file, click on "Send for Marking" to complete the process

Available from: Friday, 30 July 2010, 04:35 AM

**Submission draft**

No files submitted yet

Upload a file (Max size: 5MB)

Choose File No file chosen

Upload this file

**Final submission for assignment marking**

Send for marking

moodle You are logged in as Ankush Bhandari (Logout)

Upload your documents here

start Google CF... My... FP... re... In... FP... CF... 9:06 PM