

# Carrer Counselling Session



Date: 22 September 2020

To,  
The Principal,  
Jagran College of Arts, Science & Commerce,  
Kanpur

Subject: Exploring possibility CFP and PGCBF Certification programs for the students of Jagran College of Arts, Science & Commerce

Dear Madam,

Warm Greetings from Financial Planning Academy! (A division of Sykes and Ray Edupro Pvt. Ltd)

We are Mumbai based company having our offices in major cities of India including at Lucknow. With the motto to equip individuals with Financial know how since more than a decade, we have been able to disseminate the knowledge to more than 5,00,000+ candidates from Banking and Financial Services Industry. We have been closely working with 400+ regional language trainers across India to serve BFSI professionals and students aspiring to have careers in BFSI. We will be pleased to share a couple of highlights of our journey as a training organization operating Banking and Financial Services space.

We represent our B2C side of the business through a brand name of **Financial Planning Academy** ([www.fpa.edu.in](http://www.fpa.edu.in)).

- We are the largest Education Partner with the Financial Planning Standards Board, USA for CFP® Certification program.
- We are also authorised Education Providers for the UK based ACCA program.
- We are also training professionals and students on certification in Management Accountancy called CMA from the USA. We are also training Banking Aspirants on a program called Post Graduate Certificate in Banking and Finance and we help them get placed with private sector banks.
- We are also working closely with the BFSI Sector Skill Council for short term employability certification programs in Banking and Financial Services and Accountancy.

We represent our B2B side of the business through a brand name of **Ambition Learning Solutions** ([www.ambitionlearning.com](http://www.ambitionlearning.com)).

- **Corporate Training:** We are one of the largest Corporate Training Companies in India with domain expertise of Banking and Financial Services Companies. Few of the largest clients we cater are LIC, SBI Life, Aditya Birla Insurance, SBI Mutual Funds, Bank of Baroda, Axis Bank, Axis Mutual Funds, Birla Sunlife Mutual Funds, Tata Mutual Funds, Kotak Mahindra Bank, HDFC Mutual Fund etc.
- **Financial Literacy Events:** On behalf of Stock Exchanges and Mutual Funds Sahi Hai campaign, we have been conducting roughly 2000 financial literacy events across India. In fact we have handled a mandate to conduct one such event in each district of India. We

have been reaching out to target audiences like Corporates, Faculties, Government departments, Armed forces, Students etc.

- **NISM (SEBI) empanelled CPE Partners:** We are one of very few companies empanelled with NISM as a CPE partners to conduct refresher training for mandatory modules for Financial Market Professionals across India.

Our corporate connects into BFSI and the licenses for various international certifications can add lot of value to your student base. Our joint efforts may help your students be employable into the space of Banking and Financial Services. We would like to introduce the courses on CFP (Certified Financial Planner) and PGCBF (Post Graduate Certificate in Banking and Finance) to the students of your college.

CFP is the most respected certification for Financial Planners across the globe, recognized in 26 countries. CFP Certification is promoted by top 44 financial institutions in India including SBI, ICICI Bank, Citibank and Axis Bank among others. Many studies have indicated a huge demand for CFP professionals in Banking, Mutual Funds, Insurance, Tax, Stock Broking, Financial Planning and other Financial Services. The eligibility for enrolment in the CFP program is 12<sup>th</sup> passed students with minimum 50% marks.

PGCBF is aimed at providing practical knowledge and understanding of the Banking sector with curriculum designed as per industry norms. The certification carries professional recognition in the Banking and Financial sector. It also prepares students for the widely popular "Diploma in Retail Banking" exam conducted by the Indian Institute of Banking & Finance (formerly known as the Indian Institute of Bankers). The USP of the PGCBF is it prepares students for multiple opportunities in branch and back office functions in the high growth, high potential banking and financial services industry. The eligibility of the PGCBF course is graduation. Students of final year graduation are also permitted to be enrolled and take exams, subject to the certificates being provided after their completion of graduation.

FPA provides placement assistance at attractive salaries in Banks and Financial Institutions. The brochures of these courses are also attached for your ready reference.

We will be keen to organize special guidance webinars on CFP and PGCBF on two different days. The webinars will be of 1 hour duration each, preferably starting at 11 am on the dates to be scheduled. Based on the interest shown by students, we can initiate personalized counseling sessions for your students.

We seek your convenient time to connect with you to have a discussion. Looking forward to building a long term and fruitful relationship.

Thanking you,

For Financial Planning Academy,

sd/

Pradeep Harchandani  
[lucknow@fpa.edu.in](mailto:lucknow@fpa.edu.in)  
mobile: 9324400557

To enhance students' communication skills, job performance and career prospects, a webinar on **“Knowing yourself, Employability Skills, Group Discussion and Personal Interview”** was organized by IBS ICFAI Business School on 10<sup>th</sup> October, 2020 for the students of BBA. Dr. Nidhi Tak, Assoc. Dean and Dy. Academic Coordinator shared her views regarding the importance of soft skills emphasizing on instilling the right attitude towards leading and working in a team with professional ethics and time management skills.