

**Hello Digital Practical Financial Wellness Coach
CFP Aspirant Venkat,**

Greetings from India's Best Expert CFP Coach KEYUR SHAH & Founder, CFP Aspirant Club and COACH BLUE OCEAN – TEAM of Honest, Strict, Independent, Qualified (CFPs, CFA, CA, MBAs, Engineers) having 100+ Years Experienced Professionals in Personal Financial & Portfolio WELLNESS Coaching & Wealth Management.

COACH BLUE OCEAN TEAM with Mr. Noel Maye, Global CEO, FPSB USA on 10th November 2019, Sahara Star Hotel, Mumbai.



Pls Invest 5 to 7 hrs on below links & post u can Whatsapp / call on 9167362201 / 7021562191 for 5 to 7 minutes free discussion between 5pm to 8pm OR #Whatsapp_ADD on 9167362201 to receive regular broadcast messages or more detail.

10th Year begun as an India's Best Expert Independent CFP Coach & Practitioner. On 29-06-2011, Mr. KEYUR SHAH Passed CFP Exam 5 (AFP / Final Level)1st attempt with the A gr, 97% in a Regular Pathway. (All 5 Exams avg Score 90%+)

Mr. KEYUR SHAH Learned & Implemented CFP certification Concepts / Calculations in the SPIRIT which TRANSFORMED his Personal & Professional Life.

Happy to share that 700+ Aspirants / Students (Professionals / IFAs /RM / Investors / Freshers) had attended Coaching with KEYUR SHAH & 351+ Participants followed his Guidance & successfully completed their CERTIFIED FINANCIAL PLANNER certification with KEYUR SHAH in the last 9 Years & TRANSFORMED their Personal & Professional Life by Implementing Classroom Learning in the SPIRIT.

India's Best Quality DIGITAL PRACTICAL CERTIFIED FINANCIAL PLANNER Certification Coaching across the WORLD in ur Home / Office at Convenience.

CFP certification from FPSB USA is considered the GOLD Standard in a Personal Financial Wellness Planning & having 1,90,000+ Practitioners across Globe but in India has only 1900.

1) KEYUR SHAH's Live Recorded Practical Digital Practical (Financial Wellness Coach) CFP Live Recorded Classroom Video Learning Coaching Workshops can be downloaded from our NEW Cloud Platform across the WORLD so now it does NOT require Need of Physical DVDs via courier. (You also do not need internet connection to watch the Videos)

2) KEYUR SHAH provides Proactive Daily Avg 3 hrs Subject / Practical Application Queries solving Personalized Support through Digital meeting (Video / Audio Call) & WhatsApp / E-Mail to our Enrolled Students at mutually convenient time during week days in evening.

3) Keyur Shah is an Honest, Strict, Bitter, Independent, Qualified & Experienced Professional Coach COMMITTED 2UR TRANSFORMATION provided U follow him in the SPIRIT.

Be a Unique from a CROWD...Find your Ultimate Purpose (Mission) of your Life...Daily Work in a Mission mode to Achieve various Milestones.

How?

1) Prepare your Life & Financial WELLNESS Coaching Plan under Guidance of your MENTOR KEYUR SHAH.

2) Your Mission to prepare 500+ Family's Life & Financial Wellness Coaching Plan to achieve their Financial Independence and Live Happy, Healthy & Wealthy Life.

Key Benefits

1) Earn Guaranteed 100+% pa Returns on Coaching Fee Investment provided you Learn & Implement it in the SPIRIT.

2) You will be a True Change Leader...Success & Higher Income will be by-products.

3) You will Njoy your Profession & earn 10x Respect & Trust from your clients.

TRANSFORM your Personal Life & Professional Career with India's Best Digital Practical LIFE & FINANCIAL WELLNESS PLANNING Workshop by India's Best Expert LIFE & FINANCIAL WELLNESS COACH KEYUR SHAH

1) Be a Professional Digital Practical 10x Wise & Logical Investor Invest 1 time (Money 95k & Time 400 hrs)

5 months Course (Video Lecture + Study Material + Mentor Support) @ 95k... Payable in 5 monthly installments of 19K.

PLAN your FINANCIAL INDEPENDENCE with INDIA'S Best Expert DIGITAL PRACTICAL Financial Wellness MENTOR Keyur Shah

Watch 12 minutes Video

<https://youtu.be/hyhIUTCTZmk>

Download PPT

<https://bit.ly/38IZzp0>

Rs 5 Crore is Cost of Financial illiteracy

Watch 5 Minutes Video

<https://youtu.be/XfKIkXvwE-w>

OR

2) Be a Professional **FINANCIAL WELLNESS COACH (Digital Practical CFP) to your Client's Family: Invest 1 time (Money 200k & Time 1200 hrs)**

15 months Course (Video Lecture + Study Material + Mentor Support) @ 133k...Payable in 7 monthly installments of 19K + FPSB CFP 67k (Registration + Exams etc)

**Download Sample Hand Written Financial Wellness Plan
(27 pages)**

<https://bit.ly/3jXhLh6>

Demo Lecture (Retirement Planning)

<https://youtu.be/SYxjGDD0444>

351+ Success Stories

<http://www.thecfpaspirantclubindia.com/287-success-stories/>

WhatsApp FWC on 9167362201 to book the Pre-Joining Personalized Guidance (2K for 60 minutes) ... 1st step towards TRANSFORMATION of your Personal Life & Professional Career. **(Note: Above fee will be deducted from your Coaching Fee whenever u joined in any time in the Future.)**

India's 1st & Best, DIGITAL Practical CERTIFIED FINANCIAL PLANNER (Financial Wellness Coach) Certification LIVE RECORDED CLASSROOM (VIDEO LEARNING) Coaching WORKSHOP - Rs 250k Package at 133k for a Limited Period by India's Best Expert CFP Coach KEYUR SHAH- Last 1 Seat left in January 2021 Batch: Fee payable in 7 monthly of installments of 19K.

Watch Video

<https://youtu.be/v1PnHyYjARE>

Pls Visit website to Read/ Speak 341+ Success Stories

<http://www.thecfpaspirantclubindia.com/287-success-stories/>

WhatsApp CFP on 9167362201 to book the Pre-Joining Personalized Counselling & Guidance (2K for 60 minutes) ... 1st step to TRANSFORM ur Personal & Professional Life.

Note: Above fee will be deducted from your Coaching / Advisory Fee whenever u joined in any time in the Future.

7 Key Benefits of Digital Practical CFP Coaching

1) Emotional to Wise & Logical Investor (High Expected Returns to Avoiding Investment Mistakes & Achieve Goals)

2) MFD / RM / Agent to True FINANCIAL WELLNESS COACH

3) Learn to construct Hand written Comprehensive Customized Financial & Portfolio Wellness Coaching Plan (Earn Fixed Fee for Plan writing from your clients)

COACH BLUE OCEAN
TEAM of Honest, Strict, Independent, Qualified & Experienced Professionals

Be a HNI / NRI INVESTOR'S PORTFOLIO WELLNESS COACH
based on CFA Level 1 Syllabus
by COACH BLUE OCEAN TEAM
DVD - 01 WINDOWS
VIDEO LEARNING KIT BY KEYUR SHAH
INDIAN BEST EXPERT COACH
IN FINANCIAL PLANNING
Global Personal Analyst
Level 1 Passed
2020-2021
CFA Institute CFA Program
LEVEL 1 PASSED 2020

India's 1st & Best DoubleSure Practical 360 CFP
Video Learning Workshop
by COACH BLUE OCEAN
DVD - 01
KEYUR SHAH
INDIAN BEST EXPERT COACH
IN FINANCIAL PLANNING
TEAM of Honest, Strict, Independent, Qualified & Experienced Professionals
TRANSFORM your business, career & life with India's Best Finance Coach
2020-2021

"RETIREMENT COACH"
to your Investor's Family based on India's 1st & Best DoubleSure Practical 360 CFP Syllabus Video Learning Workshop
by COACH BLUE OCEAN TEAM
KEYUR SHAH
INDIAN BEST EXPERT COACH
IN FINANCIAL PLANNING
DVD - 01
2020-2021

"Consultant CFO"
to Small & Medium Enterprises (Business Financial Planning)
by COACH BLUE OCEAN TEAM
VIDEO LEARNING KIT BY KEYUR SHAH
INDIAN BEST EXPERT COACH
IN FINANCIAL PLANNING
INDIAN BEST EXPERT COACH IN FINANCIAL PLANNING
DVD - 01
2020-2021

KEYUR SHAH CERTIFIED FINANCIAL PLANNER^{CM}
9167362201 8169969026 YouTube KeyurShahCFP
TRANSFORM your business, career & life with India's Best Finance Coach

4) Freedom from Paying Loan EMIs (Debt free)

5) Learn to Leave the **RAT RACE** and Plan & Achieve the Financial Independence, Feeling RICH and Njoy Life Journey.

6) Partner with KEYUR SHAH for IFA / RM / Investor Coaching (COACH BLUE OCEAN Member)

7) 2nd Part time Active Income / 2nd Career Planning

Negative Attitude: I want to do CFP Coaching with India's Best Expert CFP Coach KEYUR SHAH but he asked me to invest 3x Time & Money Vs Other EPs so I decided not to enroll with him.

Positive Attitude: I will get an opportunity to Learn from India's Best Expert COACH KEYUR SHAH.

Outcome: I will be a Domain Expert which helps me to double my Income by implementing Classroom learning in Practice. Eg. Fy20 income 10 L pa. Training with X may help upto Double my income in 2031 but with Keyur Shah will help me up to double Income in 2026 subject to implementation of Classroom Learning in the SPIRIT.

COACH BLUE OCEAN TEAM attended FPSB Education Provider Meet on 27th January 2020 at Lalit Hotel, Mumbai 9am to 5pm. Mr. Noel Maye, Global CEO & Ms. Kieran Rooney, CFP®, Director of Standards and Certification, FPSB USA share detailed presentation about New Syllabus / Exams from 1st June 2020.



Build an Additional Financial Wealth of Rs 50 Lakh in the Zero Risk, Zero Tax, Free from Creditor / Court Attachments in Year 2041 with the India's Best Product in the Long-Term Fixed Income Category.

How? 1st Appoint India's Best Expert CFP Coach KEYUR SHAH as your MENTOR & when U Learn & follow him the Spirit...U will Save More by reducing life Style Expenses & Avoiding INVESTMENT mistakes and Higher Earning Pa which will help you to Invest an additional Money every Year for 21 Years. U Can use above Wealth for Retirement or Vacation or 2nd Career Planning.

Watch below Videos to know more about KEYUR SHAH, India's Best Expert CFP COACH.

1. "A Journey from RED Ocean to BLUE Ocean" - 7th CFP Learning Conference, June 2019, Mumbai.

<https://youtu.be/7sm8a6yepII>

2. Be a Future Ready...Be a Client Ready...Be a Family Financial & Portfolio Wellness Coach to your Investors Family - 6th CFP Learning Conference - June 2018, Mumbai.

<https://youtu.be/8ryxl-z92sQ>

3. Logical & Magical 5 Steps to achieve Rs 100+ Crore MF AUM - 5th CFP Learning Conference, Hyderabad.


<https://youtu.be/bvXyrXYIEPY>



CERTIFIED FINANCIAL PLANNER^{CM}

THIS IS TO CERTIFY THAT

Keyur D Shah

having satisfied the education, examination, experience and ethics requirements for certification and having agreed to abide by the Code of Ethics and Professional Responsibility and Financial Planning Practice Standards is hereby authorized to use the  and CERTIFIED FINANCIAL PLANNER^{CM} marks in India, with all rights and privileges pertaining thereto and subject to periodic renewal requirements as established and amended from time to time.

CFP^{CM} Certification *Global excellence in financial planning*

Certification Number: 52082 | Expiration: 30 September 2021

Noel Maye

Noel Maye Chief Executive Officer
FINANCIAL PLANNING STANDARDS BOARD LTD.

FPSB

FINANCIAL PLANNING STANDARDS BOARD

FPSBSM, FPSB and the certification marks CFPSM, CERTIFIED FINANCIAL PLANNERSM, and  are owned outside the U.S., including in India, by Financial Planning Standards Board Ltd.

India's 1st & Best, DIGITAL Practical FINANCIAL WELLNESS COACH (CERTIFIED FINANCIAL PLANNER) Certification VIDEO LEARNING (LIVE RECORDED CLASSROOM) Coaching WORKSHOP - Rs 250k Package at 133k for a Limited Period - Last 1 Seat left in December Batch: Fee payable in 7 monthly of installments of 19K.

**A) Total MONETARY INVESTMENT REQUIRED: 200k
(Coaching Fee 133k & FPSB 67k)**

B) Time Investment Required: Approx 1200 Hours (Avg 20 Hours / Week for 15 months)

Process Note:

Digital Practical Financial Wellness Coach (CFP) Training – 15 months (20 hrs / Week & Daily 1 Practical Application)

A) 4 months access of Digital Practical CFP Video Learning - (Live Recorded – MAY 2017 - 18 full days Training - 150 hrs) – 300 Hrs with Assignments & Practical Application.

B) 1st Module Exam Preparation: FPSB INVESTMENT PLANNING SPECIALIST (CFP Certification) – 3 months: 200 hrs Preparation required.

1) Portfolio Management Workshop - Based on CFA Level 1 Syllabus (3 full day live Recorded – January 2019) - 25 hours

2) Online or Live recorded IPS Exam oriented Supplementary Discussion (11 hours)

3) Post Training Preparation (150 hrs) – Read FPSB Study books / Ref books, Practice Question banks, Practical Applications

4) Pass Exam & Apply for Investment Specialist Certification

Must Watch Video

<https://youtu.be/PBO6BScB6yk>

C) RETIREMENT & TAX Planning SPECIALIST (2nd CFP Module Exam) – (Includes 11 hours Live or Live Recorded Classroom Training + Study Material + Mentor Support) – 2.5 months - **200 hrs Time Investment required.**

D) RISK & ESTATE PLANNING SPECIALIST (3rd CFP Module Exam) – (Includes 11 hours Live or Live Recorded Classroom Training + Study Material + Mentor Support) – **2.5 months - 200 hrs Time Investment required.**

E) FINAL EXAM (EXAM 4) - CFP certification exam - (Includes 21 hours Live or Live Recorded Classroom Training + Study Material + Mentor Support) – **3 months -300 hrs Time Investment required.**

Key Benefits

Double Your Capabilities...Double Your PRODUCTIVITY...Opportunity to earn 100%+ Return on Ur Coaching FEE Investment every year from 3rd years provided u follow our guidelines in the Spirit. (1st Be a Wise & Logical Investor...2nd Be a Best Financial Planner) *Objective is to ensure that you earn / save additional Rs 1 lakh to 2 lakh pa 3 years after successful completion of your Learning Program with us.

1. Personal Brand Building.

2. Mentor Support (Avg 30 Hrs in 15 months)

2. 3 * 3 full days Value Added Learning Certification Workshops (Retirement Coach, HNI / NRI Portfolio Planning, Consultant CFO to SME)

3. 18 Full days (150 hrs) of live recorded Digital Practical CFP Training

5. **India's 1st, 360° FAMILY FINANCIAL & PORTFOLIO WELLNESS Plan defines Expected Monetary & Non-Monetary Benefits to upper Middle-Class Clients / Investors Family.**

Immediate & Short-term Monetary benefits: Rs 5 lakh to 15 lakh in 1st 3 years.

NOTE: U WILL LEARN HOW TO PREPARE PRACTICAL 360° CUSTOMIZED COMPREHENSIVE FINANCIAL & PORTFOLIO WELLNESS PLAN of your OWN FAMILY & Potential / Existing Clients Family as part of VIDEO LEARNING KIT.

<http://www.thecfpaspirantclubindia.com/wp-content/uploads/2019/11/indias-1st-360-FFPW-plan.pdf>

6. 15 months queries handling

7. Earn 4 Certificates from Keyur Shah

8. Confidence to launch your Fee based INVESTOR COACHING.

9. Partnership Opportunity – You can be a Member of **COACH BLUE OCEAN TEAM** after completion of CFP certification

10. Membership in CFP Group

11. Opportunity to become a Speaker in our Annual Learning Conference.

Pls read all attached files / mail text / links and if any queries pls feel free to call tomorrow between 5pm to 8pm... Once you paid the fee it is understood that you have agreed Imp. communication / expected settings and follow your coach guidelines in spirit.

Once you paid the 1st Instalment fee means that you have agreed Imp. communication / expectation settings and follow your coach guidelines in the **Spirit**. (As below mentioned, **or will be given once you joined on regular basis**)

Mentor Support: Mr. Keyur Shah will be available to solve your subject / practical application Queries daily between 5pm to 8pm.

PFA Bank detail to transfer 1st Instalment Rs. 19,000/- (Nineteen Thousand Only) Via NEFT / IMPS / UPI Deposit. **(Pls don't deposit CASH) by 17-11-20...As You have already paid Rs. 2,000 pre joining Counselling fee so you can pay 1st instalment Rs 17,000.**

We are happy to offer Rs 9000 discount in your 7th monthly installment provided u have paid your 1st installment by 7th December & 2nd to 6th Monthly installments 19k by 7th every month starting January to May 2021 and 7th installment 19k – 9k = 10k provided you pay it by 7th June 2021.

PFA Pre Training preparation for better learning in video training. (need approx. 5 to 7 hrs preparation)

Important: Pre-Video Learning Preparation: You need a CASIO FC 200V Calculator to solve the test (Available at leading stationery Shop or Online Flipkart / Amazon)

Casio FC 200V online buying

<https://www.casioindiashop.com/Calculators/C38/Casio-FC-200V-Financial-Calculators.html>

- 1) Attend Pre-Tests as per given below Instruction. Mock Test (solve it in 2 hrs) **Solve it and Mention all Steps of financial calculation in the same word file and Mail it back latest by 7/12/2020**
- 2) Please Read & try to Solve Roger case study and prepare your own 2 page case study.

Video Learning Kit (2021 – 2022 Version)

India's Best Family Financial & Portfolio Wellness Coaching certificate by India's Best Expert Coach Mr. Keyur Shah.

Be a Future Ready...Be a Client Ready...Be a Family Financial & Portfolio Wellness Coach to your Investors Family.

We are happy to launch Video Learning Kit (2021 – 2022 Version) of Digital Practical - MASTER IN FAMILY FINANCIAL & PORTFOLIO WELLNESS COACH–CERTIFIED FINANCIAL PLANNER (MFFPWC – CFP)

In last 7 years, 351+ participants have already successfully completed their CFP certification in Regular pathway or Challenge Pathway with good grades @ 1st attempt with help of Video Learning Coaching Workshop.

CFP^{CM}
Digital Practical CFP
Video Learning Workshop
by India's Best Expert CFP Coach

India's 1st & Best

KEYURSHAH^{CM}
CERTIFIED FINANCIAL PLANNER^{CM}

TRANSFORM
Your Personal Life &
Professional Career
with India's
Best Expert
CFP Coach

SHAH KEYURKUMAR DINESHKUMAR
CFA Institute®
CFA Program
LEVEL I PASSED
2018

SEBI
Registered
Investment
Advisor
(INA000012926)

2021 **2022**

Key Benefits of Digital Practical CFP Video Learning Course

1) Independent Agent / Distributor: Provides Strong Foundation / Road Map to achieve Rs. 100+ Cr. MF AUM to IFA & Set up Fee based Coaching Practice.

2) FRESHER: Double your Salary...Get a good starting average salary 20k vs fresher Graduate 10k.

3) RM / WM / PB: Be a Trusted / Respected RM / WM / Private Banker. Learn how to achieve targets with a quality.

INVESTOR: Be a wise Investor...Install Financial ANTIVIRUS...Avoid mistakes to be a successful Investor...Learn to achieve ur Goals & Earn a good post tax Real rate of return.

Key Features of Video Learning Kit :

1) Training: Live Recorded Classroom Training (150 hrs- 18 full days)

We have LIVE Recorded our 78th Mega Batch (5th to 26th May 2017) 18 full days MFFPWC – 2xCFP Training Workshop – You can watch video & learn as an offline E – participant (without need of Internet) at home/office without leaving your desk and learn at your pace will take approx 300 hours with the Practice & Evening assignments.

2nd) High-Quality Study Material / Question Banks with solutions: (Soft Copy format 2500+ MB Content- Password Protected)

Study books and workbooks for each module (500+ Question per module), High quality Study Contemporary 500+ question bank with detailed Solutions from A to E case Studies, 45+ Sample Case Studies with Question bank with the solution, Short notes, and also learn to make handwritten customized Financial Plan Construction for yourself & your customer.

3) Mentor Support:

One to One Subject queries / doubt solving & Practical Application Guidance through Mail /phone / personal / Digital Meetings till you complete your CFP for maximum 15 months from date of enrolment. (avg. 30 minutes per week – Total 30 hrs during CFP Learning Journey)

4) Soft Skills Training: Client Acquisition, Advisory & Client retention

5) Hand Written Customized Comprehensive Financial Plan writing: You need to prepare 5 hand written Comprehensive Family Financial Plan under guidance of your Mentor Mr. Keyur Shah.

6) You will attend 1st module exam Investment Specialist – Online or Classroom or Live Recorded Training in Mumbai in 5th Month.

Visit link for more detail: Watch Video

<https://youtu.be/EmJi-X4YmZI>

<http://www.thecfpaspirantclubindia.com/be-a-hni-nri-investor-family-portfolio-planner/>



Certificate

This is to certify that

Sai Krishna Pinnamaneni

has successfully completed the
Professional Development Certification Workshop
be a **HNI / NRI Investor's Family Portfolio Planner**
based on CFA Level 1 Syllabus

He is now authorised to use designation

PORTFOLIO WELLNESS COACH

for the period of 1 year from
the date of issue of this certificate

Conducted by

KEYUR SHAH

INDIA'S BEST EXPERT COACH
CERTIFIED FINANCIAL PLANNER^{CM} (A grade)
CHARTERED FINANCIAL ANALYST
LEVEL 1 PASSED

Batch no: _____

Date: _____

Location: _____

Authorised Signatory



7) You will attend Online or Live Recorded or Classroom Practical Learning Workshop “Be a Retirement Coach to your Investor Family” PART OF 2ND EXAM RETIREMENT & TAX PLANNING MODULE. This Workshop will help you to meet personally Mr. Keyur Shah, solve your queries, Revision of part of CFP Syllabus & provide latest updates you as per syllabus. (Note: Training will be conducted in Mumbai) OR Video Learning Kit will be provided if you don't want to attend Classroom Training.

Ignoring it...means inviting PERIL (Why Retirement Planning is MUST?) Must Watch Video

<https://youtu.be/SYxjGDD0444>

Visit below link for more detail

<http://www.thecfpaspirantclubindia.com/retirementcoachs/>

**RETIREMENT
&
INSURANCE
WELLNESS
COACH**

SEBI
Registered
Investment
Advisor
(INA000012926)

SHAH KEYURSHAH DINESHSHAH
CFA Institute®
CFA Program
LEVEL 1 PASSED
2018

CFP™
Digital Practical CFP
Video Learning Workshop
by India's Best Expert CFP Coach
India's 1st & Best
KEYURSHAH
CERTIFIED FINANCIAL PLANNER™
TRANSFORM
Your Personal Life &
Professional Career
with India's
Best Expert
CFP Coach
2021 2022

2021-2022

Certificate

This is to certify that

Rajendra Thool

has successfully completed the
Professional Development Certification Workshop
be a **"RETIREMENT COACH" to your Investor's Family**
based on DoubleSure Practical 360° CFP Syllabus

He is now authorised to use designation

RETIREMENT WELLNESS COACH

for the period of 1 year from
the date of issue of this certificate



Conducted by

KEYUR SHAH

INDIA'S BEST EXPERT COACH
CERTIFIED FINANCIAL PLANNER^{CM} (A grade)
CHARTERED FINANCIAL ANALYST
LEVEL 1 PASSED

Batch no: _____

Date: _____

Location: _____

Authorised Signatory

8) **3rd Exam : Risk Management & Estate Planning Specialist: you will to attend Online or Classroom or Live Recorded classroom workshop.**

9) **4th Exam: You will attend Online or classroom Or Live Recorded workshop.**

10) Proactive voluntary Support in Job Placement

11) MFFPWC certification exam : We will conduct 1 exam (6 hrs – 150 marks – 50 Que) post CFP : Objective of exam is to construct hand written comprehensive Family Financial Plan of given case study. (Note: Min pass% 60%)- We will share more details once you pass CFP Exam 5.

12) You will get the Membership of CFP Practitioner Club (You will get many benefits like eg. Membership of Whatsapp group of PAN India CFP, participate in our Conferences as a Speakers, Enroll in Post CFP Learning modules etc.)

Be a
“Consultant CFO”
to Small & Medium Enterprises
(Business Financial Planning)
by India’s Best Expert CFP Coach
VIDEO LEARNING KIT – KEYUR SHAH

CFP
Digital Practical CFP
Video Learning Workshop
by India’s Best Expert CFP Coach
India’s 1st & Best
KEYUR SHAH
CERTIFIED FINANCIAL PLANNER™
TRANSFORM
Your Personal Life &
Professional Career
with India’s
Best Expert
CFP Coach
2021 2022

SHAH KEYURKUMAR DINESHKUMAR
CFA Institute®
CFA Program
LEVEL I PASSED
2018

SEBI
Registered
Investment
Advisor
(INA000012926)

2021-2022

Be a Consultant - CFO of Business / SME (BUSINESS FINANCIAL PLANNING)

13) You will be invited in 3 full day Classroom Practical Learning Workshop on Business Financial Planning (Consultant CFO to SME) after completion of CFP certification or 15 months whichever is earlier. (Note: Training will be conducted

in Mumbai) OR Video Learning Kit will be provided if you don't want to attend Classroom Training. (15 days Video access will be given)

Key Benefits: Watch Video

<https://youtu.be/2osbLXS70YY>

<http://www.thecfpaspirantclubindia.com/consultant-cfo-business-financial-planning/>

Certificate

This is to certify that
Mahesh Chavan

has successfully completed the
Professional Development Certification Workshop
be a **"CONSULTANT CFO" to Small & Medium Enterprises**
(Business Financial Planning)

He is now authorised to use designation

BUSINESS WELLNESS COACH

for the period of 1 year from
the date of issue of this certificate



Conducted by

KEYUR SHAH

INDIA'S BEST EXPERT COACH
CERTIFIED FINANCIAL PLANNER^{CM} (A grade)
CHARTERED FINANCIAL ANALYST
LEVEL 1 PASSED

Batch no: _____

Date: _____

Location: _____

Authorised Signatory

Laptop / Desktop System Technical Requirements:

OS WIN 8 / 10, RAM: 8 GB Ram, CORE I5, SYSTEM HAVING 1 TB HDD
(IF SDD & HDD BOTH THEN SDD NEEDS TO REMOVE)

EXTERNAL DVD DRIVE & CASIO FC 200 V CALCULATOR (MUST
FROM DAY1)

Please read detailed process note of Video learning kit and mail
Machine Id generated by a software application.

Your video learning kit is a software application (One user Password
protected) & for Individual use for a limited, you have to decide
specific one laptop or desktop which you will complete your Video
Learning with practice & evening assignments (Approx. 300 hrs) for
next 120 days from date of generation of password.

First Disable your Antivirus Software & Off Windows defender then
insert your first dvd in the CD drive and click on the first
video...Now, a small window will pop up and it will show your
machine id. Please Mail your machine id to generate the password.
(Please copy all DVD in your Laptop/Desktop and before running
your video please disable your antivirus software otherwise will take
5 to 30 minutes to open a video)

Imp Notes:

- 1) You may have to remove free / paid Antivirus if suggested to
solve Video copying or playing problem
- 2) You need to format your system if suggested.
- 3) You need to BUY NEW System if suggested.
- 4) You need to follow post enrolment guidance as when ever
given to solve your system related issues.
- 5) We may support in solving system related problems but not our
Duty bcoz we are not expert so You need to take a paid help of
Local Engineer to solve if suggested.

First Download DVD content on your Machine and keep the DVD as
back up and also update as a trusted application in antivirus
software application.

Please attend your Pre-Training Test (as per Instruction) before starting your video learning training.

Please insert your first dvd1 in the CD drive and click on the first video, Now, a small window will pop up and it will show your machine id. Please Mail your machine-id to generate the password.

You have to assume that you are watching live workshop (Use Headphone) which is conducted in Mumbai on your Laptop. You have to learn in self-discipline format and keep hour time for your video learning (because each video in the format of 15 to 25 minutes and require 30 Minutes to 45 minutes with practice assignments)

Your video learning kit is a software application (One user Password protected) & for Individual use for a limited period So, you have to decide specific one laptop or desktop which you will complete your Video Learning with practice & evening assignments (approx. 250 to 300 hrs) in max. 120 days from date of generation of password.

Please prepare two types of notes and attend all practice& evening Assignments to complete your learning cycle.

1) Important Notes: Principles, Process, Universal Steps, Concepts etc. (Pls refer every day)

2) Practice/Evening Assignment: Pls complete all practice/evening assignment for better post training preparation.

You have an option to pause your video/rewind or run 2 till you have concepts cleared and to solve your queries through Mail/Phone from your Coach Mr. Keyur Shah. Your Core Learning will come from Video Training. So, don't do unnecessary hurry

Queries handling: You can whatsapp / call Mr. Keyur Shah twice in a week in evening time 5pm to 8pm to solve your Subject / Practical Queries.

You will need approx. 300 hours' time to complete your video learning with practice & evening assignment and another 300 to complete your post training preparation to complete your Final Exam / 1st module exam @ 1 with Good grades and after approx. 100 hrs for each Module exam @ 1st attempt with a good grade.

In last 9 years, 351+ participants have already successfully completed their CFP certification in Regular pathway or Challenge Pathway with good grades @ 1st attempt.

Note1: Video Learning Kit is for an individual use and not to disseminate to anyone or upload any content on any websites... if any one disseminates offline/online for a fee or free will be a violation of the copyright act and liable for the legal action.

Note2: Video Learning DVDs will play only on Windows based OS (7 or 8 or 10) requires 8 GB RAM for better viewing. (USE HEADPHONE FOR BETTER SOUND & CONNECT WITH TRAINING)

Note 3: Video Learning Kit will be available limited period (Video max 4 months and Study Material Solutions for max 15 months)and can access only on one PC/Laptop due to password protected and will require a PC / Laptop with external speakers)

Participant must invest min. 20 hrs per Week for 15 months for Regular pathway to successfully complete their CFP certification with good Knowledge / Skill sets.

If participant failed to invest time then will not extend our post training support and Ideally, he / she needs to attend repeat training either Classroom or Video Learning as per applicable fees.

IMP Communication to CFP Aspirant / Student

Pls read it thoroughly before you contact me...Expectations settings from my side to avoid future conflict...Once you paid the FEE...It is understood that you have accepted conditions / guidelines.

1. Our Relationship will be Guru / Coach & Aspirant / Student (NOT a buyer – Seller)...I will help you to become Personal Finance Domain expert (True Financial Planner) and passing exams will be byproduct provided your follow our guidelines in the SPIRIT.

2. Average 3 hrs per day (20 hrs / Week) Aspirant for 15 months to achieve the domain expertise in Comprehensive Financial Plan construction and passing exams @ 1st attempt with a good grade.

3. Video Learning Kit Aspirants will get the right to access password protected Video Learning for 4 months (Only 1 window-based PC allowed). We will charge 10k extra for additional one-month extension.

4. Classroom / Video Learning participants will right to access the Soft copy Study Notes / Solutions password for limited period to 15 months...post will charge 5k for each month's extension of passwords / Post Training supports. (No Hard copy allowed)

5. Practical Application of Learning: Meeting 1 person every day and doing Goal based Financial Planning to get depth of subject matter (We will provide Handouts)

6. Post Training Supports through phone/mail/one to one query handling till you complete CFP max. 15 months from start date of 1st training session / 1st time password.

7. Queries handling time between 5pm to 8pm (Monday to Friday) ...No queries will be entertained on Saturday & Sunday...You have to 1st mail / whatsapp queries and we will reply by end of next working day. (Note: Mr. Keyur Shah is a Human not the Robot so if travelling / Non well / Engaged other Professional / Social activities...No support provided during that period)

8. You have to follow all guideline (will be given during training / post training period) to be followed in spirit...Pls note that you are doing CFP 1st time in life and Mr. Keyur Shah has produced 335+ CFPs. We will welcome suggestions but Mr. Keyur Shah's decision will be final.

9. Monetary Investments

A) Mr. Keyur Shah : Digital Practical CFP Video Learning Kit FEE 133k Pls note that you may pay in your coaching fee in 7 monthly installments of 19k but if you decided you discontinue your coaching whatever may be reasons than you will be liable to pay remaining installments as per schedule.

B) FPSB : Approx 67k (Registration, Exams etc)

10. All Contents (Includes Video Learning, Study Material, Imp. Notes & Personal Guidance) are only to use for an Individual Registered Classroom / Video Learning Participant. You will not be allowed to share (online /offline or upload) or discuss any contents for FREE or FEE to another

CFP Aspirants. If found that we will take necessary Legal Actions against you to protect our intellectual properties.

(Note: Pls take it seriously because in past we won all 3 Legal cases against those students who shared with another participants & had to pay full applicable fees)

11. VImp Notes:

1) Your Coaching FEE is NON-REFUNDABLE & applicable only in Particular Batch / Month in which you will take an Admission.

2) We will also take necessary legal actions in case of failure of paying remaining installments fee as per schedule whether you continue or discontinue so pls think twice before joining coaching.

3) You will have to pay full applicable FEE in case you want to join in New Batch in a single installment.

4) You need to pay approx 67k to FPSB for Registration / Exams / Certification/ Calculator 2k ...Pls visit <https://india.fpsb.org/> for more detail. (Mr. Keyur Shah is an Independent Coach Not an FPSB - Authorized Education Provider. You will have to enroll in a Self-Study option but if not available then we may help you to route your registration through AEP & may charge 2k to 3k to forward your application to FPSB)

5) Pls note that Your Text & Video Testimonials are an intellectual property of Mr. Keyur Shah so you will not ask to modify or delete in future. (If u wish u may opt out of it from beginning.)

Pls feel free to Call / Mail if any queries to Mr. Keyur Shah before paying 1st installment...Once Paid then you have agreed your Mentor's Expectations & follow his Pre-Joining & Post-Joining Guidance in the Spirit to Achieve the Domain expertise in a Personal Financial WELLNESS Planning & Byproduct will be a CFP certification.