



SOMAIYA
VIDYAVIHAR UNIVERSITY

K J Somaiya Institute of Management



FP&B INDIA

Executive PGDM in Financial Planning with CFP® Certification

Admission Brochure (2024-26)



Delivery Partner

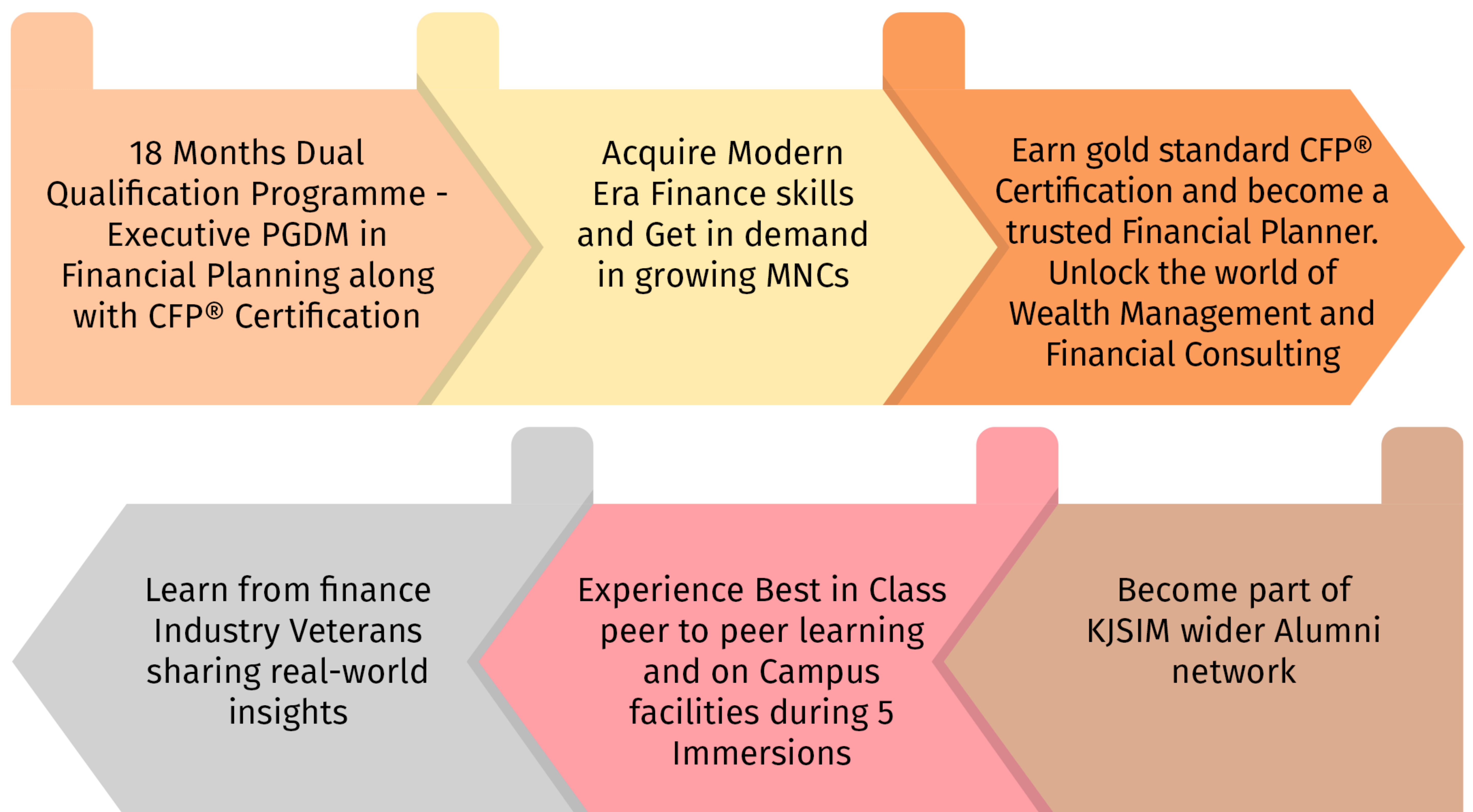
FinTram Global

About Programme

As our Economy approaches \$5 trillion mark, India's middle class is expected to grow to 45% of the population by 2025. This expansion and rising personal wealth along with growth of senior citizens, increase the need for expert financial advice amid diverse investment options & better retirement planning including life insurance where our current penetration is just around 3.2% of GDP. While financial expertise is gonna be paramount importance currently only 27% of Indians are financially literate, emphasizing the need for future professionals in the area of Financial Planning.

Our executive PGDM in financial planning programme is crafted to give you the essential skills you need to thrive in this dynamic field.

Why Choose this Programme?



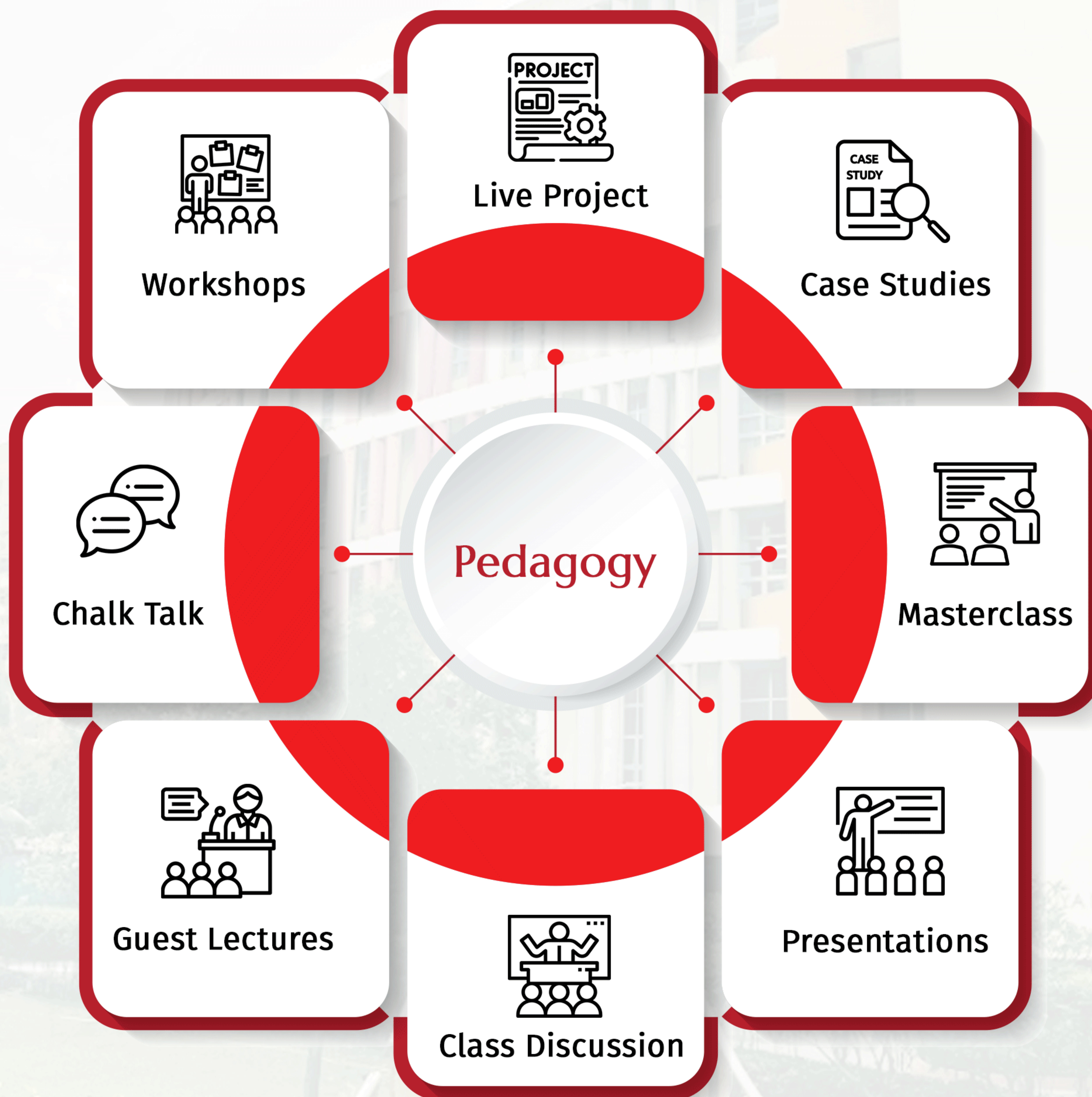
What You'll Learn



Eligibility

- Graduation (10+2+3) in any discipline from a recognised university.
- Work experience of 3 years is required (in any field).
- Eligible candidates for the programme would be required to undergo a Personal or Online Interview

Note: K J Somaiya Institute of Management reserves the right to make exceptions on a case-by-case basis.



Faculty Expertise



Highly Experienced Finance Professors



Practicing CFP® Professionals



Veteran Industry Professionals

Programme Advisory Board

Learn from various Finance Leaders, delivery excellence & impact across the globe.
Meet our amazing C-Suite and Leaders who makeup our Advisory Board.



Nilesh Shah

Group President & Managing Director
Kotak Mahindra Assest Management
Company (KMAMC)



Navneet Munot

MD & CEO of HDFC Asset
Management Company Limited



A. Balasubramanian

Managing Director & CEO
Aditya Birla Sun Life AMC Limited



Krishan Mishra

Chief Executive Officer
FPSB India



Arun Thukral CFP

Former MD & CEO Axis Securities
Professor of Practice - Finance
Convener and Programme Director

Important Dates

Applications Closing Date: 23rd Nov, 2024

Academic Orientation: 7th Dec, 2024

Course Structure

Trimester - I

- Organizational Behavior
- Managerial Economics
- Financial Management & Analysis
- Investment Planning & Asset Management
- Regulatory Compliances

Trimester - II

- Human Resource Management
- Financial Modeling
- Business Statistics
- Risk Management & Insurance Planning
- Estate Planning

Trimester - III

- Marketing Management
- Business Research Methods
- Data Science Using Python
- Retirement Planning
- Tax Planning & Optimisation

Trimester - IV

- Financial Technology & Digital Finance
- Consumer Behaviour
- Strategic Management
- Integrated Financial Planning 1
- Integrated Financial Planning 2

Trimester - V

- Business Writing and Communication
- Operational Excellence
- Integrated Financial Planning 3
- Integrated Financial Planning 4
- AI and ML Application in Business

Trimester - VI



Live Project

Disclaimer: K J Somaiya Institute of Management reserves the right to change the programme details.

Programme Fees

The fee for the programme is INR 7 Lakh.

The fees includes the cost of textbooks, reading materials and library resources, and CFP® Certification Exam Fees for one attempt, but exclude the travel and related costs of mandatory campus immersions programme at K J Somaiya Institute of Management.

Easy and attractive financing options available (at the discretion of the financial agency)

How To Apply?

Candidates can apply online by visiting website: <https://kjsim.somaiya.edu/>

An Application fees of INR 990 will be payable by all candidates applying for this programme. Since selection made on a rolling basis, candidates are encouraged to apply early as there are a limited number of seats in the programme.



SOMAIYA
VIDYAVIHAR UNIVERSITY

K J Somaiya Institute of Management

K J Somaiya Institute of Management

- ✓ Ranked among the top 10 private business schools in India, affiliated with Somaiya Vidyavihar University since 1981.
- ✓ Focuses on developing value-based and purpose-driven leaders to build a better world.
- ✓ Includes core MBA, specialized MBAs, Executive MBA, online MBA for working professionals, and MCA programmes.
- ✓ Provides tailored certificate and executive development programmes for various sectors including government bodies, companies, defense personnel, and NGOs.
- ✓ Holds prestigious AACSB accreditation.
- ✓ Extensive industry partnerships offer opportunities for guest lectures, internships, capstone projects, and mentorship, aligning with current industry needs.
- ✓ 30+ international university collaborations and 14,000+ global alumni network, with opportunities for exchange and immersion programmes for students and faculty.

FPSB India



- ✓ FPSB India is the leading financial planning body in India. Subsidiary of Financial Planning Standards Board Ltd.
- ✓ Global standards-setting body for the financial planning profession.
- ✓ Offers the globally recognized CFP® (CERTIFIED FINANCIAL PLANNER) certification.
- ✓ Home to over 2,700 CFP® professionals in India.
- ✓ Global network of organizations representing more than 223,700 CFP® professionals worldwide.



Director's Message

Welcome to K J Somaiya Institute of Management, part of Somaiya Vidyavihar University. We guide students to become purpose-oriented leaders through a holistic education combining academics, industry exposure, and personal development. Our curriculum includes projects, internships, immersions, and personalized mapping. With 80 full-time faculty and visiting experts, we offer academic and industry insights. Connect with our team, students, faculty, and alumni to join this transformative journey.



Raman Ramachandran, Ph.D
Director - K J Somaiya Institute of Management
Dean - Faculty of Management Studies,
Somaiya Vidyavihar University

Programme Director's Message



Arun Thukral CFP
Convener and Programme Director

Our Executive PGDM in Financial Planning with CFP® Certification programme transforms professionals into financial planning leaders. In Partnership with the FPSB India, we offer a unique educational experience integrating academics with practical insights.

Curriculum: Gain expertise in advanced financial planning for CFP® Certification.

Experiential Learning: Real-world projects and hands-on experiences.

Perspective: Learn from international experts and explore global financial practices.

Faculty and industry leaders provide mentorship for success in financial planning. Discover how the Executive PGDM at KJSIM can transform your career. Connect with our admissions team.

KJSIM Highlights



Legacy

Legacy of producing value based and purpose driven professionals for 40+ years.



Learn from the best

Learn from Experienced Faculty and Industry Leaders.



Comprehensive Curriculum

In-depth modules and real-world Financial Scenarios.



Campus Immersions

Engage in intensive campus immersions.



Global Alumni Base

14000+ Alums spread across 60+ countries.



Networking Opportunities

Connect with industry professionals and peers

KJSIM Illustrious Alumni



Lata Pillai
Batch - 1988
Senior MD & Head Capital
Markets - JLL



Madhusudan Kela
Batch - 1991
Proprietor - MK Ventures



Sanjay Shah
Batch - 1992
Former Country Head - India & MD
- Morgan Stanley



Jaishankar Srinivasan
Batch - 1994
MD & Group COO - Deutsche
Bank, Singapore



Linz Inasu
Batch - 1995
MD & Head - Commercial Banking &
MNCs, Corporate & Investment
Banking - First Abu Dhabi Bank, UAE



Shreeram Sethuraman
Batch - 1996
Managing Director - BNP
Paribas



Gaurang Desai
Batch - 1996
Managing Director - Strategy
Equiti Group



Rishi Srivastava
Batch - 1997
CEO - AIA, Hong Kong

Contact Details

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