

## Approved Continuous Education (CE) Points

S.No.	CE Category	CE Description	Supporting Documents	CE Points	Remarks
1	Annual Case Study	Case Study 2008-09	Answer Sheet along with Working Sheets	15	The 2008-09 Case Study will be released in February 2009
2	Authorship	Financial Planning Journal	Check in the FPJ Issue	5	Considered if the Articles submitted are selected for publishing
3	Authorship	DNA Case Study	Photocopy of Press Clipping	5	Case Studies published in DNA Money
4	Authorship	Other Print Media	Photocopy of Press Clipping	5	Topics should be from the CFP Curriculum & on a pro-bono basis
5	Authorship	Quotes in News items	Photocopy of Press Clipping	1	
6	Authorship	Book Authorship	A Copy of Book	15	
7	Authorship	Electronic/Internate Media	Print out of the article/link details	5	
8	Certification	AMFI Certification from Association of Mutual Funds in India	Photocopy of Passing Certificate	3	
9	Certification	IRDA Certification from Insurance Regulatory and Development Authority of India	Photocopy of Passing Certificate	3	
10	Certification	NSE's Certification in Financial Markets (Any Certificate)	Photocopy of Passing Certificate	3	
11	Certification	Real Estate Development by NICMAR	Photocopy of Passing Certificate	3	
12	Certification	BSE Training Institute (Any Certification)	Photocopy of Passing Certificate	3	
13	Certification	NISM Certification	Photocopy of Passing Certificate	3	
14	FPSBI Events	Annual Convention	Participation Certificate/Attendance sheet & Event Agenda/Event schedule	5	Request for Participation Certificate from FPSB India
15	FPSBI Events	Congress/Symposiums	Participation Certificate/Attendance sheet & Event Agenda/Event schedule	5	
16	FPSBI Events	CFP Meeting	Participation Certificate/Attendance sheet & Event Agenda/Event schedule	3	

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17	FPSBI Events	Roundtables	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule	5	
18	FPSBI Events	Study Tour to FPA Annual Convention	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule	5	
19	FPSBI Events	HR Summit	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule	5	
20	FPSBI Events	FPA's Annual Convention (US)	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule	10	
21	FPSBI Events	Launch meet of APFP	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule	2	
22	FPSBI Events	Full Day Workshop / Seminar	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule	5	
23	FPSBI Events	Seminar	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule	5	
24	Journal Quiz	FPSB India - Financial Planning Journal		4	Certificants has to take the Quiz on <a href="http://www.fpsbindia.org">www.fpsbindia.org</a> . 12 issues in a year. Per quiz 4 Points
25	Qualifications	Chartered Financial Analyst® from CFA Institute, USA	Photocopy of Passing Certificate	15	
26	Qualifications	Chartered Accountant from ICAI	Photocopy of Passing Certificate	15	
27	Qualifications	PhD in Finance or Equivalent	Photocopy of Passing Certificate	15	
28	Qualifications	Certified Associateship from CAIIB	Photocopy of Passing Certificate	12	
29	Qualifications	Certified Associateship from JAIIB	Photocopy of Passing Certificate	5	
30	Qualifications	Company Secretary from ICSI	Photocopy of Passing Certificate	12	
31	Qualifications	Cost and Works Accountant from ICWAI	Photocopy of Passing Certificate	12	
32	Qualifications	Master in Business Administration (Finance) or Equivalent - Full Time	Photocopy of Passing Certificate	12	
33	Qualifications	Master in Business Administration (Any) or Equivalent - Full Time	Photocopy of Passing Certificate	12	
34	Qualifications	Master in Business Administration or Equivalent - Part Time	Photocopy of Passing Certificate	9	
35	Qualifications	Licentiate/Associate/ Fellowship of Life Insurance from Insurance Institute of India	Photocopy of Passing Certificate	10	

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36	Qualifications	Actuary from Institute of Actuaries of India	Photocopy of Passing Certificate	15	
37	Qualifications	Certifications by LOMA	Photocopy of Passing Certificate	10	
38	Qualifications	Masters of Financial Analysis (CFA Charter) by ICAI University	Photocopy of Passing Certificate	10	
39	Qualifications	Master of Law (LLM)	Photocopy of Passing Certificate	15	
40	Teaching / Speaker	Public Speaking	Letter from the Organizing body	5	Should be on a pro-bono basis and topics should be from CFP Curriculum
41	Teaching / Speaker	Classroom Teaching	Letter from the Organizing body	2	Per hour basis
42	Teaching / Speaker	Workshops	Letter from the Organizing body	2	Per hour basis
43	Teaching / Speaker	Guest Lecture	Letter from the Organizing body	2	Per hour basis
44	Training Program	BSE Training Institute (Any Programme)	Participation Certificate	2	
45	Training Program	Indian Institute of Capital Markets (Any Executive Education Program)	Participation Certificate	3	
46	Training Program	1 Day Workshops/Seminars on Financial Planning and related areas	Participation Certificate	2	Candidate may apply multiple times based on no. of workshop days
47	Others	Participation FPSB India Committee Meetings	Attendance sheet	1	Request for Participation Certificate from FPSB India
48	Others	Participation FPSB India BOD Meetings	Attendance sheet	3	
49	Others	Million Dollar Round Table 2009	Participation Certificate	10	
50	Others	Answering Questions in Hindusthan Times	Photocopy of Press Clipping	2	2 Points awarded for every 2 questions answered
51	Others	Risk India 2009	Attendance sheet	5	
52	Others	Participation in Events related to Financial Services Industry	Participation Certificate/Attendance sheet	3	
53	Others	Participation in TV shows/ interviews	Video CD with the Clipping	3	

### Notes

- 1 Credits earned under category of FPSBI Events/ Speakership/ Qualifications/ Certifications/ Training Program/ Others &
- 2 Credit in excess of the required 15 credits may not be applied to subsequent reporting periods.
- 3 Credits earned for any one program may not be split between two reporting periods. Extensions of time to file CE reporting forms