

## Survey 5: Tax Planning and Estate Planning - Restructuring CFP Exam Syllabus

FPSB India has undertaken to restructure Exam 1-4. The following will be the features of the Restructured Examination System:

1. The topic list of each examination is spread across 5 distinct parts, exhaustively covering important aspects in each exam syllabus.
2. There are 4 marks categories indicating difficulty grade as well as testing methodology, viz. testing concepts, knowledge, analytical aptitude and synthesis.
3. The 5x4 matrix provides scope for thoroughly testing the candidate on all aspects with intensity on some emphasized as per industry trends.
4. Sixteen sectors out of the possible twenty sectors test a candidate on the entire domain of knowledge, financial mathematics skills and complex situations.
5. The alternate questions in the sector are all different, varying on concept and methodology but involve the same level of difficulty and time for solving.
6. Through an elaborate Job Analysis the "Necessity and Importance Ratings" determined by the Financial Services Industry will test a candidate on essential deliverables.
7. The weights determined through Job Analysis of all populated sectors (out of 30 possible) will be published for the Education Providers and Students to develop the right perspective on Financial Planning.

We seek inputs from CFP<sup>CM</sup> Certificants, other professionals, academicians and trainers with respect to the rating of topics covered under each exam syllabus. The average topic rating thus arrived would be the importance which the industry attaches to the respective topics and on which more focus is required by a candidate pursuing the Program.

Your ratings are invited on a Scale of 4 to 1, defined as below:

<b>Rating</b>	<b>Significance</b>
4 . . . . .	Highly Important
3 . . . . .	Important
2 . . . . .	Appropriate
1 . . . . .	Just Appropriate

Please choose your rating scale on each topic listed in the survey. You may, however, choose the button "Exclude", if you feel that the topic is not worthy to be covered in accordance with the Financial Planning Competency Profile.

CFP<sup>CM</sup> Certificants shall be eligible for the award of 3 CE points (Continuous Education Points) for completing each such survey.

This is the 5<sup>th</sup> such survey and covers "Exam 4 - Tax Planning and Estate Planning". Please click the link below and oblige us and the Financial Planning industry by devoting 10 minutes of your valuable time.

[https://www.surveymonkey.com/s/Job\\_Analysis\\_Survey\\_5](https://www.surveymonkey.com/s/Job_Analysis_Survey_5)

**Team - Knowledge Management**  
**Financial Planning Standards Board India (FPSB India)**