



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

3-Statement Modeling

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study
Finance: 5.0 credits.



Certificate number
8714506

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 24, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Accounting Principles and Standards

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study
Accounting: 2.0 credits.



Certificate number
8714516

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 11, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Advanced Excel Formulas & Functions

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study
Finance: 3.5 credits.



Certificate number
8714494

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 28, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Budgeting and Forecasting

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 4.5 credits.



Certificate number
8714501

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 20, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

FP&A Monthly Cash Flow Forecast Model

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 2.0 credits.



In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Certificate number
8714502

Scott Powell
Chief Content Officer

Sep 23, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Comparable Valuation Analysis

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 3.5 credits.



Certificate number
9648721

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Oct 30, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Corporate Finance Fundamentals

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 2.5 credits.



In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Certificate number
8714510

Scott Powell
Chief Content Officer

Jul 14, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Dashboards & Data Visualization

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 3.5 credits.



Certificate number
8714498

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 16, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

DCF Valuation Modeling

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 7.5 credits.



Certificate number
9645685

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 28, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Professional Ethics

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study

Regulatory Ethics: 2.0 credits.



Certificate number
8714513

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell

Chief Content Officer

Sep 16, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Excel Fundamentals - Formulas for Finance

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study
Finance: 3.0 credits.



Certificate number
8714509

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Nov 02, 2020



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Financial Analysis Fundamentals

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 4.5 credits.



Certificate number
8714505

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell

Chief Content Officer

Sep 11, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Presentation of Financial Information

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study
Finance: 1.0 credits.



Certificate number
8714518

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 28, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Operational Modeling

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study
Finance: 6.0 credits.



Certificate number
8714520

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 26, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

PowerPoint & Pitchbooks

National Registry of CPE Sponsors Number: 139079
Instructional Delivery Method: QAS Self Study
Finance: 4.5 credits.



Certificate number
8714492

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 16, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Power BI Fundamentals

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study
Finance: 6.5 credits.



Certificate number
8714524

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Nov 11, 2023



801-750 West Pender Street Vancouver BC V6C 2T8

The Board of Directors of the
Corporate Finance Institute® have conferred on

Prashanth Nair

who has pursued studies and completed all
the requirements for the certificate of

Scenario & Sensitivity Analysis in Excel

National Registry of CPE Sponsors Number: 139079

Instructional Delivery Method: QAS Self Study

Finance: 1.5 credits.



Certificate number
8714503

In accordance with the standards of the National Registry of CPE Sponsors,
CPE credits have been granted on a 50-minute hour.

Scott Powell
Chief Content Officer

Sep 20, 2023

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair



Academic Program History

Program Completed: Business Intelligence & Data Analyst
Courses Completed: 2 / 25

Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Business Intelligence & Data Analyst (BIDA®) Program.

Course Name	Course type	Course Duration	Test Result
Excel Fundamentals - Formulas for Finance	Prep	3.5h	PASSED
Introduction to Business Intelligence	Prep	1h	
Statistics Fundamentals	Prep	3h	
Fundamentals of Data Analysis in Excel	Core	8h	N/A
Fundamentals of Data Analysis in Excel - Case Study	Core	3h	
Intermediate DAX & Time Intelligence	Core	6h	
Power BI Case Study – CFI Capital Partners	Core	3h	
Power BI Fundamentals	Core	6h	PASSED
Power Query Fundamentals	Core	6h	N/A
Power Query Fundamentals Case Study	Core	1.5h	
Python Fundamentals	Core	5.5h	
Python Fundamentals Case Study	Core	2.5h	
Regression Analysis - Fundamentals & Practical Applications	Core	6.5h	N/A
SQL Case Study - WOWI Sales Analysis	Core	3h	
SQL Fundamentals	Core	10h	
Tableau Fundamentals	Core	8h	
Tableau Fundamentals Case Study	Core	3.5h	
Advanced Power BI	Elective	9h	
Advanced Tableau - Table Calculations	Elective	2h	
Advanced Tableau - Data Model	Elective	2h	
Advanced Tableau - LOD Calculations	Elective	5.5h	
Enterprise Deployment & Governance: Power BI Edition	Elective	3.5h	
Power BI Financial Statements	Elective	7h	N/A
Power Pivot Fundamentals	Elective	4h	N/A
Tableau Trading Dashboard	Elective	5h	

The above results were achieved through completion of the Business Intelligence & Data Analyst course.

*All courses are self-study. Please note that to receive the BIDA® Certification, students are required to complete 14 core courses

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair



Academic Program History

Program Completed: Financial Modeling & Valuation Analyst
Courses Completed: 21 / 42
Date Completed: 11/02/2024
Exam Result: FAILED
Exam Date: 17/03/2024

Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Financial Modeling & Valuation Analyst (FMVA®) Program.

Course Name	Course type	Course Duration	Test Result
Accounting Fundamentals	Prep	5h	PASSED
Analyzing Growth Drivers & Business Risks	Prep	2h	N/A
Capital IQ Fundamentals	Prep	2h	N/A
Corporate Finance Fundamentals	Prep	2.5h	PASSED
Excel Fundamentals - Formulas for Finance	Prep	3.5h	PASSED
Excel Fundamentals - Quick Start Guide	Prep	3.5h	N/A
Math for Finance Professionals	Prep	3h	N/A
Reading Financial Statements	Prep	1.5h	PASSED
The Role of The FP&A Professional	Prep	1.5h	N/A
3-Statement Modeling	Core	6.5h	PASSED
Accounting Principles and Standards	Core	2h	PASSED
Budgeting and Forecasting	Core	7h	PASSED
Comparable Valuation Analysis	Core	4.5h	PASSED
DCF Valuation Modeling	Core	10h	PASSED
Dashboards & Data Visualization	Core	6h	PASSED
FP&A Monthly Cash Flow Forecast Model	Core	3h	PASSED
Financial Analysis Fundamentals	Core	5h	PASSED
Introduction to 3-Statement Modeling	Core	6h	PASSED
Introduction to Business Valuation	Core	6h	PASSED
Operational Modeling	Core	8h	PASSED
PowerPoint & Pitchbooks	Core	7.5h	PASSED
Professional Ethics	Core	3h	PASSED
Scenario & Sensitivity Analysis in Excel	Core	2.5h	PASSED
Advanced Excel Formulas & Functions	Elective	4.5h	PASSED
Corporate & Business Strategy	Elective	7.5h	N/A
ESG Integration & Financial Analysis	Elective	6.5h	N/A
Excel VBA for Finance	Elective	7.5h	N/A
Fundamentals of Data Analysis in Excel	Elective	8h	N/A
Leveraged Buyout (LBO) Modeling	Elective	15h	N/A
Mergers & Acquisitions (M&A) Modeling	Elective	8h	N/A
Mining Financial Model & Valuation	Elective	5h	N/A
Modeling Risk with Monte Carlo Simulation	Elective	4h	N/A
Power BI Financial Statements	Elective	7h	N/A
Power BI Fundamentals	Elective	6h	PASSED
Power Pivot Fundamentals	Elective	4h	N/A
Power Query Fundamentals	Elective	6h	N/A
Presentation of Financial Information	Elective	2h	PASSED
Real Estate Financial Modeling	Elective	6.5h	N/A
Regression Analysis - Fundamentals & Practical Applications	Elective	6.5h	N/A
Startup / e-Commerce Financial Model & Valuation	Elective	6.5h	N/A

The above results were achieved through completion of the Financial Modeling & Valuation Analyst course.

*All courses are self-study. Please note that to receive the FMVA® Certification, students are required to complete 14 core courses and 3 elective courses.

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair

Academic Program History

Program Completed: Financial Modeling & Valuation Analyst
Courses Completed: 21 / 42
Date Completed: 11/02/2024
Exam Result: FAILED
Exam Date: 17/03/2024



Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Financial Modeling & Valuation Analyst (FMVA®) Program.

Course Name	Course type	Course Duration	Test Result
Renewable Energy - Solar Financial Modeling	Other	6.5h	N/A
The Amazon Case Study (New Edition)	Other	12.5h	N/A

The above results were achieved through completion of the Financial Modeling & Valuation Analyst course.

*All courses are self-study. Please note that to receive the FMVA® Certification, students are required to complete 14 core courses and 3 elective courses.

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair

Academic Program History

Program Completed: Capital Markets & Securities Analyst
Courses Completed: 2 / 42



Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Capital Markets & Securities Analyst (CMSA®) Program.

Course Name	Course type	Course Duration	Test Result
Economics for Capital Markets	Prep	3h	
Excel Fundamentals - Formulas for Finance	Prep	3.5h	PASSED
Excel Fundamentals - Quick Start Guide	Prep	3.5h	N/A
Foreign Exchange Fundamentals	Prep	2h	
Introduction to Capital Markets	Prep	2h	N/A
Math for Finance Professionals	Prep	3h	N/A
Refinitiv Workspace Fundamentals	Prep	1h	
Commodities Fundamentals	Core	3h	
Derivatives Fundamentals	Core	2.5h	
Equity Markets Fundamentals	Core	4h	
Fixed Income Fundamentals	Core	3.5h	N/A
Hedge Fund Fundamentals	Core	3.5h	
Portfolio Management Fundamentals	Core	1.5h	
Professional Ethics	Core	3h	PASSED
Spot Foreign Exchange	Core	2.5h	
Advanced Fixed Income	Elective	2.5h	
Advanced Futures & Forwards	Elective	3.5h	
Applied Fixed Income	Elective	7h	
Behavioral Finance	Elective	4h	
Commercial Mortgages	Elective	5h	
Convertible Bonds	Elective	3h	
Credit Fixed Income	Elective	3.5h	
Equity Trading Fundamentals (CFI X AmplifyME)	Elective	1h	
Equity, FX, and Rate Futures	Elective	2.5h	
Foreign Exchange - Deliverable Forwards	Elective	3.5h	
Foreign Exchange - Non-Deliverable Forwards	Elective	2h	
Futures Pricing and Commodity Futures	Elective	3.5h	
High-Yield Bonds, Subordinated Debt, and Loans	Elective	4.5h	
Modeling Risk with Monte Carlo Simulation	Elective	4h	N/A
Options Hedging and Trading Strategies	Elective	1.5h	
Origination Fundamentals - Debt Capital Markets Perspective	Elective	4h	
Pricing Options and Option Sensitivities	Elective	3h	
Prime Services and Securities Lending	Elective	1.5h	
Repo (Repurchase Agreements)	Elective	3h	
Securitized Products	Elective	3.5h	
Short Duration Products	Elective	4.5h	
Swaps Fundamentals	Elective	5.5h	
Syndicated Lending	Elective	3.5h	
Trading Using Technical Analysis	Elective	4h	
Understanding Options	Elective	2h	
Applied Technical Analysis for Equity Markets	Other	2h	

The above results were achieved through completion of the Capital Markets & Securities Analyst course.

*All courses are self-study. Please note that to receive the CMSA® Certification, students are required to complete 8 core courses and 7 elective courses.

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair

Academic Program History

Program Completed: Capital Markets & Securities Analyst
Courses Completed: 2 / 42

Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Capital Markets & Securities Analyst (CMSA®) Program.



Course Name	Course type	Course Duration	Test Result
Deconstructing Options	Other	1h	

The above results were achieved through completion of the Capital Markets & Securities Analyst course.

*All courses are self-study. Please note that to receive the CMSA® Certification, students are required to complete 8 core courses and 7 elective courses.

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair



Academic Program History

Program Completed: Commercial Banking & Credit Analyst
Courses Completed: 6 / 59

Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Commercial Banking & Credit Analyst (CBCA®) Program.

Course Name	Course type	Course Duration	Test Result
Accounting Fundamentals	Prep	5h	PASSED
Analyzing Growth Drivers & Business Risks	Prep	2h	N/A
Banking Products and Services	Prep	4h	
Careers in Commercial Banking	Prep	1h	
Excel Fundamentals - Formulas for Finance	Prep	3.5h	PASSED
Excel Fundamentals - Quick Start Guide	Prep	3.5h	N/A
Forms of Business Structure	Prep	1.5h	
Fundamentals of Credit	Prep	2h	
Introduction to Agribusiness	Prep	1.5h	
Introduction to Banking	Prep	2h	
Pitch Deck Essentials for Lenders	Prep	2h	
Vertical IQ Fundamentals	Prep	1.5h	
3-Statement Modeling	Core	6.5h	PASSED
5 Cs of Credit	Core	1.5h	
Account Monitoring and Warning Signs	Core	1.5h	
Assessing Drivers of Business Growth	Core	2h	
Assessing Management	Core	2.5h	
Cash Flow Cycles and Analysis	Core	2.5h	
Completing a Credit Application	Core	2h	
Credit Administration and Documentation	Core	1.5h	
Effective Business Writing	Core	2.5h	
Evaluating a Business Plan	Core	3h	
Financial Analysis for Credit	Core	7.5h	
Loan Covenants	Core	3h	
Loan Pricing	Core	4h	
Loan Security	Core	2h	
Professional Ethics	Core	3h	PASSED
Reading Business Financial Information	Core	3.5h	
Agriculture Lending Fundamentals	Elective	2h	
Asset-Based Lending & Alternative Finance	Elective	5h	
Cash-to-Accrual Accounting	Elective	2h	
Commercial Banking - Debt Modeling	Elective	4.5h	
Commercial Mortgages	Elective	5h	
Construction Finance Fundamentals	Elective	2.5h	
Converting Leads to Customers - Negotiation & Closing	Elective	3h	
Corporate & Business Strategy	Elective	7.5h	N/A
ESG for Commercial Lenders	Elective	3.5h	
Equipment Finance	Elective	3h	
FP&A Monthly Cash Flow Forecast Model	Elective	3h	PASSED
Lending to Complex Structures	Elective	4.5h	
Lending to Medical Professionals	Elective	4h	

The above results were achieved through completion of the Commercial Banking & Credit Analyst course.

*All courses are self-study. Please note that to receive the CBCA® Certification, students are required to complete 16 core courses and 3 elective courses.

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair

Academic Program History

Program Completed: Commercial Banking & Credit Analyst
Courses Completed: 6 / 59



Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Commercial Banking & Credit Analyst (CBCA®) Program.

Course Name	Course type	Course Duration	Test Result
Mergers & Acquisitions (M&A) Modeling	Elective	8h	N/A
Operational Modeling	Elective	8h	PASSED
Origination Fundamentals - Debt Capital Markets Perspective	Elective	4h	
Private Banking	Elective	4h	
Problem Loans	Elective	3.5h	
Profitable Lead Generation	Elective	4.5h	
Real Estate Fundamentals	Elective	3h	
Retail, Restaurant, & Franchise Lending	Elective	4h	
Securitized Products	Elective	3.5h	
Syndicated Lending	Elective	3.5h	
Trade Finance	Elective	2.5h	
Venture Debt	Elective	4.5h	
Boss Brewing Inc. – Connecting Capital Structure & Credit St...	Other	1.5h	
Modeling Taxes for Different Business Structures	Other	1.5h	
RockCrusher Rentals	Other	5h	
Rocky Mountain Holdings Ltd. - Commercial Mortgage	Other	5h	
Widgets Inc. - Adjusting a Business Owner's Net Worth	Other	1.5h	
Woodchucks Ltd. - Owner Occupied Commercial Real Estate	Other	5h	

The above results were achieved through completion of the Commercial Banking & Credit Analyst course.

*All courses are self-study. Please note that to receive the CBCA® Certification, students are required to complete 16 core courses and 3 elective courses.

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair



Academic Program History

Program Completed: Financial Planning & Wealth Management Professional
Courses Completed: 4 / 29

Having been assessed in accordance with the requirements of Corporate Finance Institute™, the student has achieved the following results in the Financial Planning & Wealth Management Professional (FPWM™) Program.

Course Name	Course type	Course Duration	Test Result
Accounting Fundamentals	Prep	5h	PASSED
Assessing Drivers of Business Growth	Prep	2h	
Banking Products and Services	Prep	4h	
Excel Fundamentals - Formulas for Finance	Prep	3.5h	PASSED
Excel Fundamentals - Quick Start Guide	Prep	3.5h	N/A
Introduction to Financial Planning and Wealth Management...	Prep	2h	
Math for Finance Professionals	Prep	3h	N/A
Reading Financial Statements	Prep	1.5h	PASSED
Alternative Investments for Wealth Advisors	Core	1.5h	
Asset Classes and Financial Markets	Core	2.5h	
Behavioral Finance	Core	4h	
Economics for Financial Advisors	Core	2.5h	
Effective Business Writing	Core	2.5h	
Effective Communication for Client Facing Advisors	Core	2h	
Financial Planning Principles	Core	2.5h	
Mastering Client Discovery	Core	1h	
Networking, Prospecting, & Converting Leads	Core	1.5h	
Portfolio Management for Retail Clients	Core	2.5h	
Professional Ethics	Core	3h	PASSED
Risk Management and Insurance Planning	Core	3h	
Commodities Fundamentals	Elective	3h	
Derivatives Fundamentals	Elective	2.5h	
Developing a High Impact Financial Plan	Elective	2.5h	
Equity Markets Fundamentals	Elective	4h	
Fixed Income Fundamentals	Elective	3.5h	N/A
Options Strategies for Wealth Advisors	Elective	2h	
Private Banking	Elective	4h	
Spot Foreign Exchange	Elective	2.5h	
Understanding Options	Elective	2h	

The above results were achieved through completion of the Financial Planning & Wealth Management Professional course.

*All courses are self-study. Please note that to receive the FPWM™ Certification, students are required to complete 12 core courses and 4 elective courses.

Transcript of Academic Record

as of 14-Apr-2024

Student Transcript

Student No.: 100409333
Student Name: Prashanth Nair

Course Name	Course type	Course Duration	Test Result
test			N/A