ZEBRA LEARN

Certified Financial Advisor Program

Kickstart your Finance Career

3 Month Live Professional Program

by Meenakshi Verma

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ABOUT
ZEBRA LEARN

ZebraLearn is an educational platform that brings to you highly Job-ready courses taught LIVE by practitioners in the industry, working in the industry for at least 10+ years. ZebraLearn enables you to become Job- ready in different profiles in finance.

We believe that there is a need for practical knowledge in the field of finance. The gap between classroom and industry practices is quite wide and that is where ZebraLearn comes in to the picture.

ZebraLearn is India's only learning platform in the field of finance which leverages the power of collaborative learning. Here, every learner becomes part of the community and then chats, interacts and forms groups with other learners and experts to learn about course content. It is an initiative by ZebraPro.in – A Unique Equity Research Tool.

ZEBRALEARN FOCUSES ON 3 CRUCIAL THINGS:

Job- Ready Programs

Experienced Instructors

Collaborative Learning

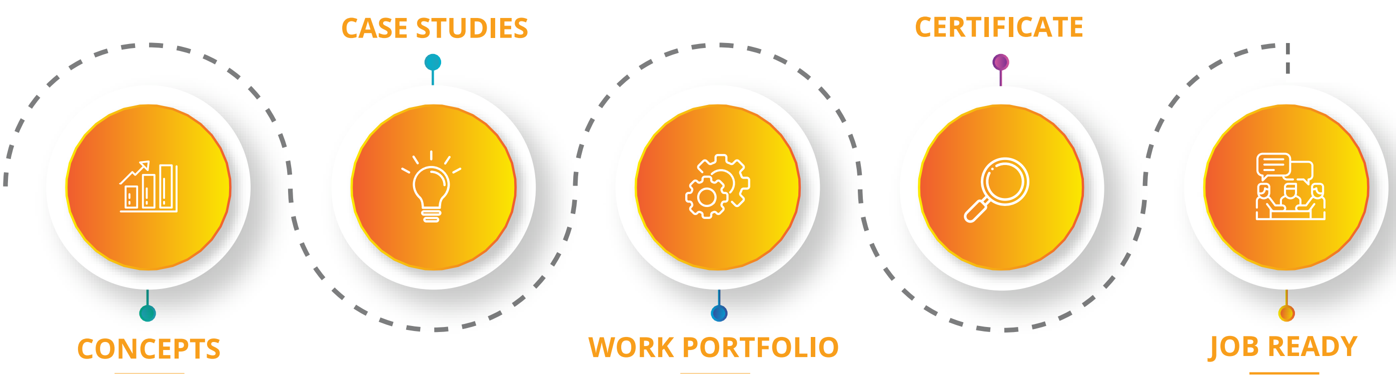
ABOUT
THE COURSE

ZEBRA LEARN

Certified Financial Advisor Program is a 13 week Live Training Program which gets you Job-ready in the different verticals of Finance. The course is taken by Mrs. Meenakshi Verma who has worked in the industry for 20+ years. She is an NISM certified trainer too who has trained about 4000+ professionals.

Key Modules covered in this Program -

- Mutual Fund
- Wealth Management
- Investing
- Insurance
- Commercial Banking
- Advisory



PROGRAM HIGHLIGHTS

ZEBRA LEARN

13
Modules

13 Weeks
Live Online Course

52+
High Quality Sessions

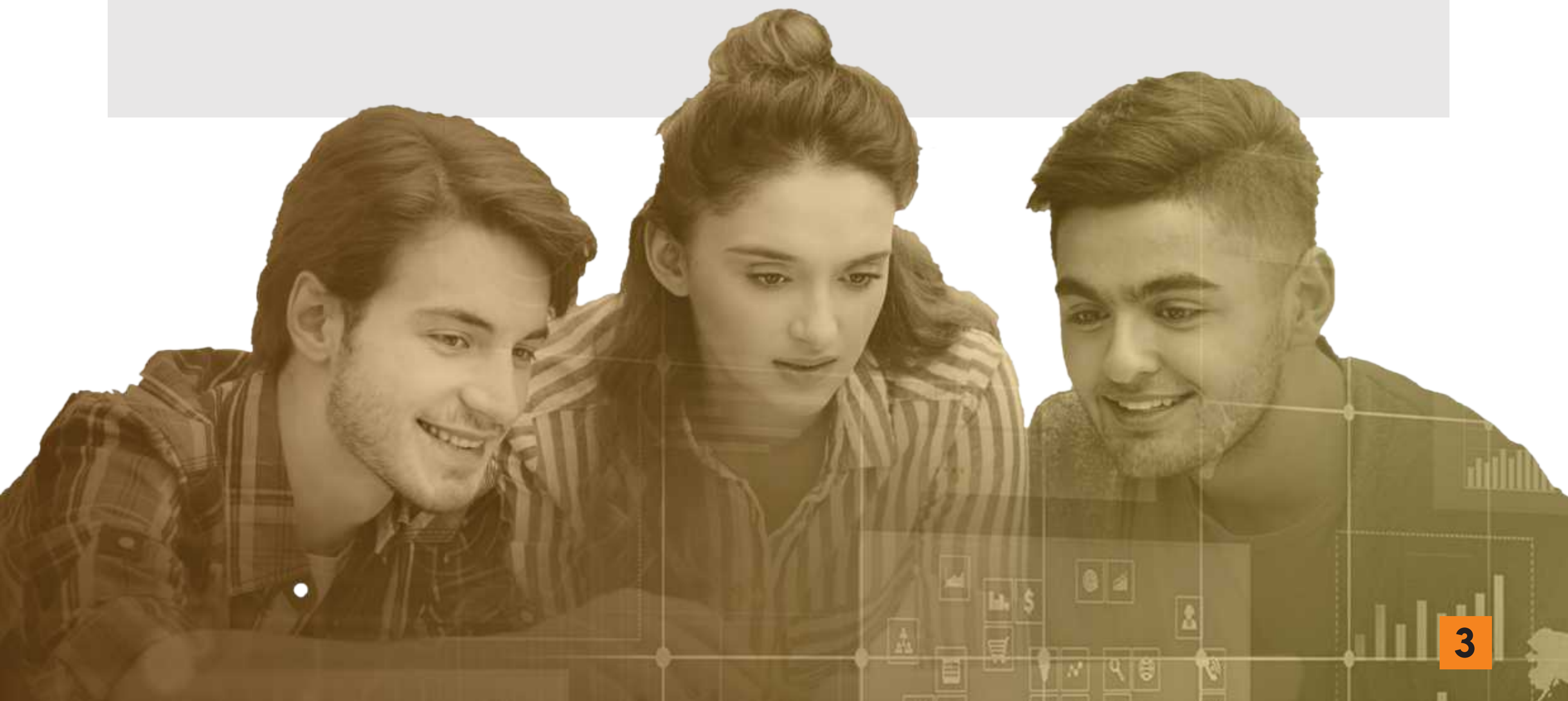
130+
Hours of Training

FINANCE
Holistic Curriculum

INSTRUCTOR
Meenakshi Verma
Industry Veteran with 20+ Years of experience,
NISM Certified Trainer

CERTIFICATION
Course Completion certificate from Zebralearn Pvt Ltd

CLASS SIZE
70-100 students
Networking and Community Support



SCOPE OF FINANCIAL ADVISOR AS A CAREER

By 2025 total individual wealth is expected to grow at a CAGR of 11.7% to reach 811 lakh crores (Source: Karvy). Increase in individual wealth drives the growth of the overall wealth management and financial advisory industry.

So, more Insurance policies are issued, more mutual investments are done, higher the scope of growth for those making a career in this field.

HNI (high net worth individual), UHNI (ultra-high net worth individual) and corporates are the major source income for a financial advisor because they surrender huge amount of asset under management.

As a fresher right out of the college, this is one of the most in-demand field because it offers some of the most well-paid, secure, and reputed opportunities.

An investment in your Career Now today will pay you the best interest tomorrow

2.5-6L entry level salary offered

12,000+ Open Jobs currently available

4L+ Professionals built a strong career

RS 37 TN AUM managed by the Mutual fund industry

BENEFITS
OF A CAREER IN FINANCIAL ADVISORY

Finance industry is considered to be one of the most lucrative industries because of the well paid opportunities and high job security offered. Moreover, it is easy to get started in this industry even with a graduation degree. Here are the major benefits that this industry offers:

WHO SHOULD ATTEND

This Program is suitable for those who want to build a career in the following Domains:

- Financial Advisory
- Financial Planning
- Wealth Management
- Mutual Fund & Insurance Distribution

WHY
ZEBRA LEARN

Learn Under the Guidance of Meenakshi Verma, Industry Veteran

Our instructor has worked for more than 20 years in the industry and students get a chance to learn directly from her experience.

Experience Practical Learning

Everything in the Program focuses on hands-on training so you learn the 'how' of everything and can apply in reality knowledge.

Interactive Classrooms

Work on various projects that help you interact with peers and instructors, dedicated feedback and doubt sessions conducted.

1 Year access to Course materials

You will have access to our course material for a year, enabling you to brush up on core concepts and stay on top of your game!

13+ Advanced Modules

Finance is an ocean of opportunities. To facilitate specialization, our curriculum is split into 15 dedicated modules, each touching upon a core aspect of finance.

WHY
ZEBRA LEARN

Portfolio Building

Create a solid portfolio by the end of your training to showcase along with your resume and grab the best job opportunities.

Certificate

This Program is a Certified Program and students receive a Completion Certificate in their name that can be used for their job search

Feedback Session

Instructors host feedback sessions regularly and gives feedback on the work done & clarifies any doubts the students might have.

Community Support

Community of like-minded people, gives you a chance to network, work together, discuss projects, ask doubts and more.

Recordings Available

In case you are unable to attend a few sessions, you can watch the recordings to be upbeat with the Program.

WHAT
WE COVER IN THIS PROGRAM

ZEBRA LEARN

1. FINANCIAL MATHEMATICS

1. Simple and Compound Interest
2. Time Value of Money
3. Rule of 72
4. Rule of 115
5. Real Vs Nominal Rate of Return
6. CAGR
7. Concept of Annuities with examples

2. INDIAN FINANCIAL MARKET

1. Structure of Indian Financial Market

1. Banking System
2. Securities Market
3. Commodities Market
4. Foreign Exchange Market
5. Insurance Market
6. Pension Market

2. Participants of Financial Markets and their role

1. Stock Exchanges
2. Depository Participants
3. Custodians
4. Stock Brokers
5. Investment Banks
6. Commercial Banks
7. Insurance Companies
8. Pension Funds
9. Asset Management Companies
10. Investment Advisor

3. Regulators of the Financial Market

1. Ministry of Finance
2. Ministry of Corporate Affairs
3. Registrar of Companies
4. Reserve Bank of India
5. Securities and Exchange Board of India
6. Insurance Regulatory and Development Authority of India
7. Pension Fund Regulatory and Development Authority

3. ASSET OPTIONS

1. Fixed Deposits
2. Fixed Income (G Securities, Bonds)
3. Small Saving Schemes (KVP, NSC, PPF, Post office Schemes, Senior Citizen Saving Scheme, Sukanya Samriddhi Scheme)
4. Pension- EPF, VPF and NPS
5. Equity (Primary Market, Secondary Market)
6. Gold as an investment (Physical Gold, SGBs, Gold ETF)
7. Real Estate

WHAT
WE COVER IN THIS PROGRAM

ZEBRA LEARN

8. Derivatives
9. Currency
10. Crypto Currency

4. MUTUAL FUNDS

1. Definition
2. Benefits of Investing in Mutual
3. Fund
4. Structure of Mutual Fund
5. Types of Mutual Fund
6. Risk Return and Performance
7. How to invest in Mutual Fund
8. How to Select
9. Morningstar categories
10. Morningstar MF Tools
11. Rights of Mutual Fund Unit
12. Holder
13. Taxation
14. Precautions to be taken

Lots of Case Studies

5. INSURANCES

1. Understand Risks and Uncertainties faced

1.Types of Risk
2. Risk Profile for each asset

2. Health Insurance

1. What is it
2. Who needs it
3. Different Types
4. Amount of cover needed
5. Examples case studies

3. Life Insurance

1. What is it
2. When is it needed
3. Amount of cover Needed
4. Example case studies

4. General Insurance

1. Motor
2. Business
3. Accident
4. Amount of cover needed
5. And all other types of it

5. How to select Insurance

1. Health Insurance
2. Life Insurance
3. General Insurance

6. Policy Documents explanation

7. Taxation

8. Case studies

WHAT
WE COVER IN THIS PROGRAM

ZEBRA LEARN

6. MORTGAGE

1. Home Loan
2. Car Loan
3. Personal Loan
4. Education Loan
5. Credit Card

7. INDIVIDUAL CLIENT PROFILE

1. What is Profile

2. Personal Finance Canvas

3. Personal Balance Sheet and Income Statement

1. How to create it
2. Investible Portfolio and Support Assets
3. Business Assets vs Personal Assets
4. Checking for solvency. How to deal with insolvent client

4. Return Objectives

1. Return Quantification
2. Return Goals
3. Flexibility of goals
4. Retirement Planning

5. Risk Management

1. GETAI principle
2. Risk Taking Willingness and comfort

6. Time Horizon

1. Timeline
2. Examples

7. Taxation Planning

1. How Taxes work. Detailed New Regime and Old Regime
2. Different Taxation stages - Investment, Interest and Redemption
3. Exemptions and Deductions
4. Relating Taxes to investments
5. Capital Gains Tax
6. Examples and Case Studies

8. Legal Concerns

9. Liquidity concerns

1. Transactional
2. Precautionary Needs
3. Growth Needs

10. Unique Circumstances

8. BARRIERS TO MONEY MANAGEMENT

1. Black Money
2. Fear

WHAT
WE COVER IN THIS PROGRAM

ZEBRA LEARN

3. Unsupportive Family
4. Ignorant nature of Clients
5. Social Pressure on Financial Decisions
6. Business Ownership

9. CREATING A PERSONAL FINANCE PLAN

1. Day to Day Cash Management system
2. Emergency Fund Management
3. Insurance Needs management
4. Investment Planning based on profile

10. CASE STUDIES

1. 10 case studies pre-defined
2. 8 case studies to be done at home. As assignment

11. OPERATIONAL ASPECT OF WEALTH MANAGEMENT

1. Different types of investors
2. Pan and KYC
3. Dematerialisation of Securities
4. Maintenance of investors account
5. Special Investor Category

12. WEALTH MANAGEMENT CLIENTS

1. How to approach clients
2. Where to find clients
3. Language Templates to connect and get business
4. FAQs asked by clients
5. Tips and Tricks
6. Dealing with certain conditions

13. BARRIERS TO MONEY MANAGEMENT

1. PMLA, 2002

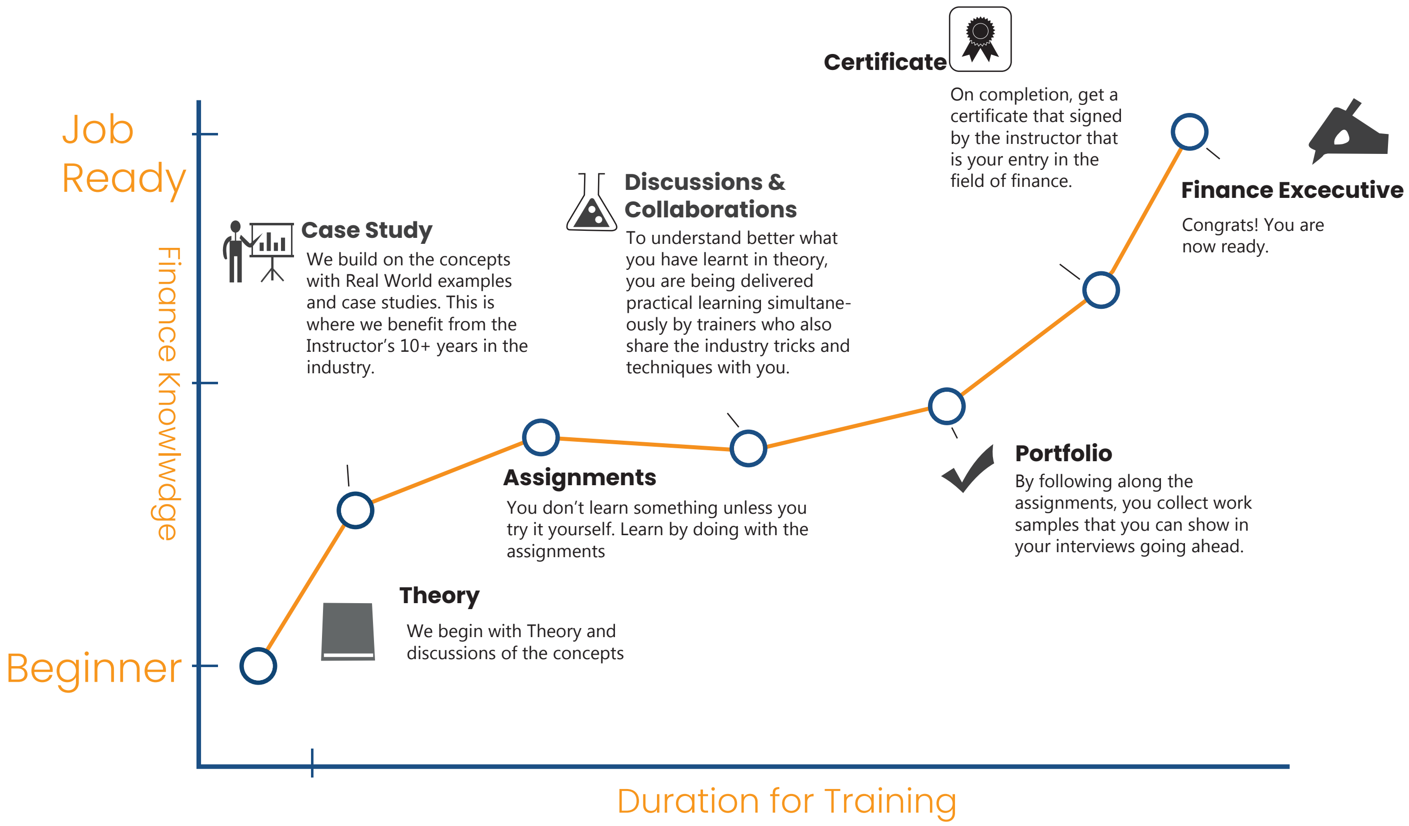
2. Regulation
1. SEBI

2. IRDA

3. Investor Complaint Redressal
1. SCORES
2. Banking Ombudsman
3. IRDA Grievance Redressal Mechanism
4. Others

HOW
WE TEACH

We have created a learning path that begins from absolute basics, talks about concepts and then goes on to build on them using real world case studies. You then take on the assignments, which also builds your portfolio that you can show in your interviews. All this, while collaborating with your peer learners and making a career in the field.



Live Face - to - Face Online Classes

Avail Lecture recordings within 24 hrs

Create you work sample portfolio along with the course

Collaborate with your peers and stay connected for life

ZEBRA LEARN

Meet **Your Instructor**

MEENAKSHI VERMA

Educator & BFSI Veteran for 20+ Years

120+ Sessions Conducted

Sessions conducted for:

500+ Hours of Training

4000+ Professionals Trained

Students, IFAs, Wealth Managers, Employees of Corporate Houses.

Meenakshi Verma is an accomplished and ardent analyst who has been working in the field of wealth management for over 20 years. She has been a NISM **certified Trainer for last 4 years**

She was formerly the Sr Vice President at IFAN Finserv. Apart from this, she has also been associated with top league companies like RR Investors, Cholamandalam Mutual funds, ING Investment management Pvt. Ltd. And so on throughout her professional journey

WHAT
WE OFFER

ZEBRA LEARN

WE KNOW THIS IS A CRUCIAL STEP FOR YOU AND WE HAVE A SIMPLE CHART TO MAKE THE DECISION EASY.

	Internships	MBA (Tier 2/3)	Other Paid Finance Programs	Certified Financial Advisor Program
Cost (excluding GST)	N/A	8L-15L	0.5L-2L	9990/-
Cost, if umemployed post completion	N/A	8L-15L	1.5L-10L	Zero
Time Investment	3-6 months	12-24 months	4-12 months	3 months
Jobs after Completion	Maybe	3L-7L	2.5L-4L	3L-8L
Kind of Jobs	Same as Internship	Mostly in Sales/Ops	N/A	High potential Financial Roles
Practical Exposure in Marketing	Medium	Low	Low- Medium	High
Behavioural Skills Development	Low-Medium	Medium	Low	High
Career Mentors	Depends if people have time	N/A	N/A	Yes
Networking	Limited	Your Batchmates	Limited	A very powerful growth network
Trainers	Seniors & Bosses	Professional Trainers	Professional Trainers	Industry experts with 10+ years of exp
Portfolio Building	Medium	N/A	N/A	High

WHAT
YOU CAN BECOME

ZEBRA LEARN

Roles	Salary (₹)
Insurance	
Insurance Advisor	2,50,000
Commercial Banking	
Branch Manager	8,00,000
Operations Manager	7,35,000
Personal Banker	5,95,000
Customer Service office	3,10,000
Loan/mortgage officer	5,80,000
Teller	4,00,000
Sales Officer	3,50,000
Financial Services	
Financial Advisor/Planner	3,50,000
Portfolio Manager	10,00,000
Stock Broker	4,50,000
Relationship Manager	3,90,000
Mutual Fund	
Operations Executive	3,50,000
Unit Manager	5,25,000
Relationship Manager	3,90,000
Fund Manager	12,00,000
Sales Executive	6,00,000
Reasearch Associate	5,60,000
Wealth Management	
Personal Financial Advisor	5,50,000
Relationship Manager	3,90,000
Portfolio Manager	10,00,000
Wealth Manager	12,45,000
Consultantcy	
Financial Advisor	4,20,000
Product Distribution	5,05,000

CERTIFICATE OF COMPLETION

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PROGRAM
PATTERN

ZEBRA LEARN

WEEKLY PLAN

MON	TUE	WED	THU	FRI	SAT	SUN

2 WEEKDAY SESSIONS — 4 HRS

2 WEEKEND SESSIONS — 4 HRS

WEEKLY TIME = 8HRS + 2HRS (FOR PROJECTS)

13 WEEK PROGRAM

WEEK 1	WEEK 2	WEEK 3
WEEK 4	WEEK 5	WEEK 6
WEEK 7	WEEK 8	WEEK 9
WEEK 10	WEEK 11	WEEK 12
WEEK 13		

13 WEEKS × 10 HRS = 130+ HRS

ZEBRA LEARN

PROGRAM COST

~~₹14,999~~ **₹9990**

inclusive of taxes

REFUND

100% refundable if you do not like the Program in the first 7 days of commencement

Enroll Now

ZEBRA LEARN

Join us to become the financial leaders of tomorrow

Kickstart your Financial Career

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