Wealth Management Certification

Accredited by NISM under the SEBI Investment Advisor Regulations, 2013

Accredited Wealth Planner

Contact: info@finxpert.org

FinX | CIEL CENTRE FOR INVESTMENT EDUCATION & LEARNING

Become an Accredited Wealth Planner

AWP Accredited Wealth Planner

Recognised by leading Banks, Mutual Funds, Broking Houses, Financial Distribution and Wealth Firms

Well-rounded curriculum covering Investments, Banking, Insurance and Estate Planning

Builds a strong foundation of investment concepts, products, asset allocation and financial planning

Interactive live sessions by industry experts with case studies and real-life examples to facilitate an application based learning

The wealth management industry offers attractive career opportunities for qualified professionals to provide financial services to affluent clients

Course Details

Curriculum

- Risk, Return and Asset Allocation
- Personal Finance and Investment Planning
- Equity Markets: Structure and Working
- Equity Analysis & Investing
- Debt and Derivatives Markets
- Mutual Funds Products
- Mutual Funds in Wealth Management
- Insurance
- Banking
- Other Investment Products
- Leverage in Personal Finance
- Process and Regulations

Elements

- Online access to content on LMS, Case Studies, Quizzes
- Live sessions by industry experts
- Practice tests to prepare for the final examination
- Proctored Online exams

We have trained more than 17,000 people in Wealth Management

Student Success Stories

★★★★★

MIRAE ASSET
Mutual Fund

FinX provided exceptional faculty and personalized career support, helping me land my dream role at Mirae Asset. Their guidance in resume building, interviews, and package negotiation truly made the difference.

Heli Shah Senior Executive, Mirae Asset

LIC MUTUAL FUND

The guidance and support I received from FinX and CIEL gave me valuable exposure to real-world financial markets and expert mentorship. I'm truly grateful for the smooth placement process that helped me secure a role at LIC Mutual Fund's head office.

Deepal Mehta Zonal Coordinator - West Zone, LIC Mutual Fund

YES SECURITIES

The finance curriculum and expert-led sessions equipped me with practical insights and real-world exposure. Thanks to FinX, I secured a role aligned with my passion in the fixed income space.

Viddhi Mojidra Product Associate - Fixed Income, Yes Securities

Placement Partners

Work with the most reputed names in the Banking, Financial Services and Insurance industry

ADITYA BIRLA CAPITAL

Groww

MOTILAL OSWAL

NIRMAL BANG a relationship beyond broking

HDFC securities

MIRAE ASSET Mutual Fund

Piramal Finance

The MoneyMart

SBI Securities Investment aur Trust, Dono

InCred Borrow. With Confidence.

BLUE OCEAN STRATEGIES

1POINT1

MULTI-ACT

PGIM India Mutual Fund

PANTOMATH

Emkay© Your success is our success

kotak Securities

AD NAIKWEALTH

MAX LIFE INSURANCE

pnb MetLife Milkar life aage badhaein

LINKIntime

ASSET MINE

YES SECURITIES

SUNDARAM ALTERNATES Sundaram Finance Group

AUTO HANGAR INSURANCE BROKERS PVT. LTD.

DBS

FinQuant INVESTMENT

Academic Mentors

Dr Uma Shashikant

- Doctorate in Finance
- Founder and Chairperson, CIEL
- Former Professor at the National Institute of Securities Markets (NISM)

Dr Uma has been a personal finance columnist since 2003 and currently writes a weekly column for ET Wealth.

Dr Raj Agnihotri

- PhD from Kent State University
- Mary Warner Fellow and founding Director of Ivy Sales Forum
- Former John Merrill Endowed Professorship in Consultative Sales at University of Texas-Arlington

Dr Raj currently serves on the advisory boards of startups based in US, Europe, and India.

Nikunj Sharma

- MBA in Finance
- Director, CIEL
- Head Investor Awareness & Training

Nikunj has over 25 years of experience in the BFSI industry and a published author of the book ‘The Stock Market Monk’

Harish Menon

- Chartered Accountant
- Founder & CEO of H-Zone Capital Management Services (H-Zone Capital) & Co-Founder of House of Alpha

Harish has over 20 years of experience in financial markets, taxation, accountancy.

Joydeep Sen

- MBA , CFP Finance
- Corporate Trainer, Author, Columnist
- Former Senior Vice President - Advisory Desk at BNP Paribas Wealth Management

Joydeep has over 25 years of experience and has been awarded “100 Most Influential BFSI Leaders” by BFSI Congress.

Rajendra Kalur

- MBA in Finance & CFA
- Life Goals Practitioner
- Volunteer Director CFA Society, India

Rajendra has over 20 years of experience and has worked in senior management positions in organisations like DSP Merrill Lynch, ABN Amro & ICICI Pru AMC

Suraj Kaeley

- MMS in Marketing
- Master Coach - Retirement Income Course & The Sales Accelerator
- Former Group President for Sales & Marketing at UTI.

Suraj has over 30 years of industry experience and worked at senior leadership positions at Franklin Templeton, MetLife Insurance, FIL Fund Management.

T.S.Jagadharini

- Associate Member of Institute of Company Secretaries of India
- Former Executive Director at JP Morgan Chase
- Empanelled with NISM to conduct certification programs

Jagdharini comes with over 20 years of experience and has also served as Vice President, NSE.

About Us

We are a skilling company, driven by the promise of a brighter India, vision of connecting formal education with practical skilling to create job ready students for BFSI. We are one the largest corporate training companies in BFSI Industry and have been providing corporate learning solutions since 18+ years to employees and professionals in Banking, Asset Management, Wealth Advisory, Insurance, Financial Distribution and Broking Companies.

We are headquartered in Mumbai (financial capital of India) with presence in over 100 cities across the country**. Senior Management team comprises accomplished & seasoned professionals from BFSI Industry with cumulative experience of over 400 years.

We work with Universities, Colleges, BFSI Corporates & Learners with an objective to:

- Skill students to be Job ready & offer them 100% placement assistance
- Train corporate employees on regulatory gate-keeping examinations, specialised certifications in finance & online courses.
- Conduct customised induction programs and productivity enhancing techno - behavioural trainings
- Conduct Financial Awareness Programs on behalf of Regulators, Stock Exchanges and Mutual Funds for corporate employees, faculty, students, self-employed, women groups etc.

Credentials

- **48000+** Students trained to be job ready
- **1000000+** Corporate employees and learners trained
- **75+** Placement Tie-ups with BFSI companies
- **300+** College Affiliations* pan-India
- **140+** Corporate tie-ups for Training / Up-skilling mandates
- **100+** Online Courses and Certifications (BFSI Technical Domains and Soft Skills)
- **1300+** Empanelled Trainers across the country
- **NISM accredited Training Partner** for CPE since 2010
- Partner of **SEBI, PFRDA, NISM, NCFE, BSE, NSE** and many more

To know more, visit
www.finxpert.org
www.ciel.co.in

REGISTER NOW ›

A Net Promoter Score (NPS) measures how likely participants are to recommend CIEL/FINX training programs to others.The metric provides insight into customer satisfaction and the reputation of the company.

*Including CPBFI partnerships on behalf of Bajaj Finserv
** Our Industry practitioners & Expert Trainers

Data as of March 2025

Follow our social handles **@Finx Learning** and **@ciellearning**