

Retirement Readiness

CERTIFICATION



~ brought to you by ~



Pramerica

MUTUAL FUND



CENTRE FOR INVESTMENT
EDUCATION & LEARNING

Most of us are experts at bringing in investments and focusing on the acquisition phase of a persons' life. However many of us struggle when our clients retire and enter the distribution phase. Recommending dividend plans or SWP options alone may not necessarily be the most ideal recommendation.

Moreover, there is a growing business opportunity in focusing on Retirement. Increasing number of people across age groups, especially in their later years are approaching advisors to guide them with their retirement investments. Therefore it pays to have better Retirement conversations.



ABOUT THE CERTIFICATION

The Retirement Readiness Certification is brought to you by DHFL Pramerica Mutual Fund & CIEL, to build competency in the area of retirement. This certification aims to help you, by enhancing the quality of interactions you can have with your clients and making the right recommendations relevant to the distribution phase of your client's life. The Retirement Readiness Certification brought to you by DHFL Pramerica Mutual Fund & CIEL, is a relevant program that has the power to qualitatively alter retirement related conversations, by bringing in retirement concepts in a very practical format.



SUITABLE FOR THOSE WHO WANT TO



Prepare themselves to have meaningful retirement conversations with clients



Scale up to a higher valuation business model with retirement-oriented assets

COURSE CONTENT

1

Retirement income needs & objectives

2

Integrate understanding of products and strategy

3

Recommend appropriate tax-efficient retirement income options

COURSE OUTLINE

1

The Retirement Mindset

The need and urgency for retirement solutions

2

Retirement Principles and Products

An introduction to retirement solutions, both traditional and modern

3

Execution of Retirement Solutions

Well-rounded retirement solutions encompassing the entire spectrum of products, including the distribution phase.

4

Financial Dashboard

Covers the Retirement Math and relevant calculators

5

Converting Corpus into Income

Provides insights into designing optimal retirement income streams

DURATION

2 Month online certification
(SELF STUDY)

COURSE STRUCTURE



- Comprehensive e-workbook
- Concept building through online self-study modules with interactivities
- Online videos, infographics, glossary terms and articles
- Practical and relevant case studies
- Quizzes and tests to monitor progress
- Online exam and certification

ELIGIBILITY

Empaneled distributors of
DHFL Pramerica Asset Managers. Pvt. Ltd.

If you are not empaneled with DHFL Pramerica Mutual Fund then you can empanel online in a few minutes at:
dhflpramericamf.com/empanelment

EXAM

The Certification exam will be held once a month at NSE IT centres across locations. Exam dates will be intimated on registering for online exam.

Fees for the first attempt is included in the course fees, subsequent attempts will be charged at Rs 500 per attempt inclusive of tax.

Course Fees : **Rs.10,500 (inclusive of GST)**

DHFL Pramerica Discount : **Rs.6,500**

Register and Pay : **Rs.4,000**



**COURSE AVAILABLE
FROM**

15th April 2018

COURSE FEES

ABOUT DHFL PRAMERICA ASSET MANAGERS PVT. LTD.

DHFL Pramerica Asset Managers Pvt. Ltd. is a 50:50 joint venture between Pramerica and DHFL. Pramerica is the brand used by Prudential Inc (PFI) in India. It is among the top 10 asset managers in the world. It is also the largest life insurance and retirement player in the world's largest market – United States. DHFL is the second largest housing finance company in India with a presence in 351 cities and towns across India. DHFL Associate companies cover a wide spectrum of businesses including home finance, education loans, life insurance, general insurance and asset management.

We manage over Rs.24,000 Cr of average assets through our Mutual Fund schemes and our PMS services. We have offices in 23 cities and are backed by a strong investment team comprising over 18 members (as on 28th Feb 2018)

ABOUT CIEL

Centre for Investment Education and Learning (CIEL) is a learning solutions company for the investments and financial services sector. CIEL's training approach combines conceptual clarity with practical application. We have conducted Wealth Management Certification Programs since 2007. CIEL's Wealth Management Advance Certification is accredited by NISM under the RIA guidelines. Trained over 12000 private bankers, advisors and relationship managers

TO REGISTER FOR THE RETIREMENT READINESS CERTIFICATION

Visit: dhflpramericamf.com/retirement

Or

Speak to your **DHFL Pramerica MF Relationship Manager**

Or

In case of any queries email: partnerdesk@dhflpramericamf.in

The Retirement Readiness Certification is being offered by DHFL Pramerica Mutual Fund and Centre for Investment Education & Learning (CIEL), to build competency in the area of retirement which will enhance the knowledge and quality of interaction of the participants in the field of retirement products. The participants may offer services in the field of retirement products, subject to fulfilling regulatory requirements, if any, in this regard.