



Department of School Education

Sheet No.100

Career of the Day

Thursday

Financial Planner

Date 24/02/2022

What is it really?

As a Financial Planner, your job will be to understand the financial situation of people and guide them accordingly so that they can achieve their financial objectives. Financial objectives could be the purchase of a house, purchase of a land and other properties, children's education, marriage, medical expenses, etc. You will advise people about where to invest money, which insurance policies to buy, which pension plans to invest in and so on.
(Punjab Career Portal)

Pathway 1

1. Class 10th with all subjects 2. +2 in any Stream preferably commerce 3. Appear for the Certified Financial Planner (CFP) examination and obtain CFP Certificate.

Pathway 2

1. Class 10th with all subjects 2. +2 in any Stream preferably in commerce 3. Bachelor's degree in any subject 4. Post graduation in Master of business Administration (MBA)/Financial Management/Banking, Financial Services and Insurance (BFSI)/ Financial Services/Insurance Services or any other similar field.

For details contact School Counsellor or visit Punjab Career Portal
<http://punjabcareerportal.com> and Mashaal Website:-
User ID: Student's E-Punjab ID <http://mashaal.ssapunjab.com>
Password: 123456

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Mon- Sciences, Tuesday- Emerging Career, Wednesday- Arts, Thursday- Commerce
Friday- Sports, Saturday- Entrepreneurship/Vocational/ NSQF/ Employment Generation