

***NISM-Series-XVII:
Retirement Adviser
Certification (Training)***



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NISM-Series-XVII: Retirement Adviser Certification (Training)

Training : Online Live Interactive Sessions(On Zoom)

Duration : 16 Hours+

Faculty : 20 years+ Industry Experience



Study Materials:

- Self-Paced learning (recordings) access for 90 days
- PPTs (700+ slides) & PDFs
- 800+ MCQs with Solutions
- Excel spreadsheets
- Career Guidance/Counseling
- Quick revision summary notes.

Assessment Structure by NISM:

- 100 MCQs of 1 mark each
- Duration: 2 hours.
- Passing score: 60%.
- Negative marking: 25% of the marks assigned to a question.
- Certificate Validity: 3 years



ICAPITAL ACADEMY & CORPORATE ADVISORY LLP



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Disclaimer: The online training format, trainer, course duration, and study materials are subject to change without prior notice.



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Key highlights:

**Online Live
Interactive
sessions+ Online
Self-paced**

**Duration: 16+
hours**

**Faculty: 20+
years of industry
experience**

Curriculum overview:

- ❖ Recognize the importance of retirement planning, including emotional and financial aspects.
- ❖ Understand financial markets, asset classes, asset allocation, and macroeconomic impacts.
- ❖ Learn goal setting, accumulation and distribution strategies, and risk management.
- ❖ Explore the National Pension System (NPS), its features, tax benefits, and investment options.
- ❖ Evaluate funds using performance metrics, benchmarks, and risk factors.
- ❖ Understand various mandatory and voluntary retirement products.
- ❖ Apply planning strategies like corpus shortfall bridging, tax optimization, and automation.
- ❖ Manage special cases like debt and essential documentation.
- ❖ Know regulations, PFRDA's role, ethics, and grievance redress systems.

Study Materials:

- ❖ Recording available of online live Sessions (for 90 days)
- ❖ PPTs (700+ slides), PDFs & Excel
- ❖ spreadsheets.
- ❖ 800+ MCQs with explanation
- ❖ Quick revision summary notes.
- ❖ Career guidance/counselling

Assessment Details:

- 100 Multiple Choice Questions: 1 mark each
- Total Marks: 100
- Duration: 2 Hours
- Passing Score: 60%
- Negative Marking: 25% of marks assigned per incorrect answer
- Certificate Validity: 3 years

Upon successful completion of the training, candidates will;

Upon passing the examination, candidates will:

- **Understand Fundamental Concepts in Retirement Planning:**
Grasp the importance of starting retirement savings early, associated risks, and emotional aspects.
- **Learn the Retirement Planning Process:**
Evaluate client situations, set goals, and monitor retirement plans effectively.
- **Master the Features and Benefits of the National Pension System (NPS):**
Understand the working, subscription process, and tax aspects of NPS.
- **Evaluate Fund Performance and Select Suitable Products:**
Analyze returns, assess risks, and match products to investor needs.
- **Apply Retirement Planning Strategies:**
Develop approaches like periodic investments, bucket strategies, and automated investments.
- **Navigate Special Retirement Situations:**
Address issues such as debt obligations and create effective documentation.
- **Understand Regulatory Frameworks:**
Learn about regulations governing retirement advisers, PFRDA's role, and ethical practices.

Are you eligible ?

Associated Professionals:

- ❖ Proprietors, partners, and representatives of retirement advisers registered under PFRDA (Retirement Adviser) Regulations, 2016.
- ❖ Employees involved in providing retirement advisory services in compliance with PFRDA regulations.
- ❖ Professionals handling retirement planning, fund selection, and client advisory roles.

Aspiring Individuals:

- ❖ Candidates pursuing 10th, 12th, undergraduate, or postgraduate studies with an interest in retirement planning and advisory services.
- ❖ Wealth managers, financial planners, and investment advisors seeking to specialize in retirement advisory.
- ❖ Individuals aiming to understand retirement planning strategies, NPS features, and regulatory requirements to enhance their professional skills.

About NISM:

- NISM is a public trust established in 2006 by SEBI to enhance standards in India's securities markets.
- It undertakes wide-ranging capacity-building activities for market participants.
- Programmes include residential PG courses, short-term training, and faculty development.
- NISM offers 29 SEBI-mandated and voluntary certifications through 250+ test centers nationwide.
- It manages six schools of excellence for specialized training.
- NISM is expanding globally to become a premier financial education hub.

About ICAPITAL Academy:

- ❖ ICAPITAL Academy & Corporate Advisory LLP, established in October 2020, is a premier institution in financial education and advisory.
- ❖ Specializes in NISM certification preparation, capital markets training, and applied finance programs. Offers industry-relevant courses in Financial Modeling, Equity Research, Derivatives, Forex, Technical & Fundamental Analysis, and Mutual Funds.
- ❖ Provides self-paced, live online, and classroom-based learning formats for diverse learner needs. Delivers corporate training solutions focused on workforce upskilling, leadership development, and customized financial competency programs.
- ❖ Advisory services span financial research, personal finance, project finance, loan syndication, debt restructuring, and strategic corporate planning.
- ❖ Mission: To foster global financial excellence through quality education and professional empowerment.

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Empowering sustainable growth through knowledge and strategic edge.

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