

Ref: FPSBI / EXAM / 03

October 05, 2018

CHANGE OF ASSESSMENT YEAR (AY) FOR THE CFP^{CM} EXAMINATION

This is to inform all concerned that the applicable Assessment Year shall be **AY 2018-19** (pertaining to the Financial Year 2017-18) with effect from **November 19, 2018** in respect of **Exam 4: Tax Planning and Estate Planning** (TPEP).

In view of the published "Syllabus & Topic List – CFP^{CM} Certification Program": Pattern of Module VI (Exam 5), a candidate can access the final **Exam 5: Advanced Financial Planning** on the basis of Case Studies published on FPSB India's website at least 7 days prior to the test date. The revised Case Studies pertinent to Exam 5 have been published on FPSB India's website today, i.e. October 5, 2018. Hence, a suitable date after October 12, 2018 will be the effective date to consider **AY 2018-19** for questions based on income tax computation and other tax laws.

It may be noted that there are **no structural changes** in the other features of CFP^{CM} examination such as pattern, scoring, etc.

Revised Sample Paper for Tax Planning & Estate Planning – TPEP/Exam 4 along with suggested solutions shall be uploaded on FPSB India's website under CFP Certification > Sample Papers (Exam 1-4) by October 31, 2018.

Revised Sample Case Studies (SP-1 and SP-2) and their respective Working Notes (WN-1 and WN-2) for Advanced Financial Planning (Exam 5), for Regular as well as Challenge Status Pathway candidates, shall be uploaded on FPSB India's website under CFP Certification > Sample Papers (Exam 5) by October 12, 2018.

Knowledge Management Division
Financial Planning Standards Board India