MONTH 1

ADVANCED LEARNING & ADVISORY PREPARATION

Objective

Develop the practical knowledge, communication skills and client-handling abilities required for a career in financial advisory.

WHAT WE COVER

- 1. Client Acquisition & Prospecting. Understanding how to identify potential clients, approach prospects and develop a client pipeline.
- 2. Client Relationship Building. Understanding client requirements, financial goals, concerns and expectations while developing long-term relationships.
- 3. Communication & Presentation Skills. Professional communication, active listening, asking relevant questions and explaining financial concepts in a simple and effective manner.
- 4. Advisory Process & Financial Planning. Understanding client requirements, financial goals, risk appetite, financial gaps and the investment planning process.
- 5. Case Studies & Mock Client Situations. Practical case studies, role plays, mock client conversations and objection-handling exercises.
- 6. Client Objection & Query Handling. Understanding common client concerns and learning to respond to questions and objections professionally.
- 7. CRM & Advisory Process Training. Training on CRM usage, client information, interactions, follow-ups and other advisory-related activities.
- 8. Entrepreneurial Advisory Approach. Understanding client network development, referrals and the fundamentals of building a career in financial advisory.
- 9. Expert Mentorship & Feedback. Guidance and feedback from experienced professionals through discussions, case reviews and practical exercises.

Outcome

By the end of Month 1, candidates should have the knowledge and practical skills required to begin working with real prospects and clients.

MONTH 2

PRACTICAL IMPLEMENTATION & PERFORMANCE

Objective

Apply the knowledge and skills developed during the programme through real client interactions and assigned advisory activities.

WHAT WE COVER

- 1. Real Client Meetings. Target: 3–5 meetings during Month 2. Candidates will participate in actual client meetings and apply their communication and advisory skills in real situations.
- 2. Client Onboarding. Candidates will work towards building their initial client base through actual onboarding activities.

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Fydaa users	Savestment user

- 3. Daily Expand Guidance Activities. Candidates will carry out assigned Expand Guidance activities on a daily basis, including prospect interaction, client engagement and follow-ups.
- 4. Practical Exposure. Candidates will handle different client requirements, questions, objections and communication situations with guidance from experienced professionals.
- 5. CRM & Documentation. Candidates will maintain accurate records of client and prospect information, meetings, follow-ups and assigned activities.
- 6. Mentorship & Performance Feedback. Candidates will receive regular guidance and feedback based on their work, client interactions, communication, advisory approach and overall performance.

CRM & DOCUMENTATION INCLUDES

- Updating meeting details in the CRM
- Maintaining client and prospect information
- Recording follow-ups and activity updates
- Uploading meeting photographs
- Completing required documentation

PERFORMANCE EVALUATION

How programme performance is assessed

- Achievement of onboarding targets
- Quality and consistency of client meetings
- Application of programme learning
- Client communication and handling
- CRM updates and documentation
- Execution of assigned activities
- Consistency and overall performance

Outcome

Successful completion of the programme and achievement of the defined KPIs and performance standards will determine the candidate’s eligibility for a permanent position with Fydaa. Permanent employment is subject to successful completion of the programme and fulfilment of the applicable performance requirements.

PROGRAMME FEE

₹17,500

+ applicable taxes

ONE-TIME PROGRAMME FEE

The fee covers the complete 2-month FYIAEP programme, including NISM examination preparation, mentorship and practical exposure.

START YOUR CAREER IN INVESTMENT ADVISORY

Take the first step towards building a career in financial advisory with Fydaa.

SEBI Registered Investment Adviser
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