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*rise*

RISE EXCELLENCE ACADEMY INDIA PVT. LTD

*unlimited earning opportunities*

# Certified Fund Trainer

Empowering Investors and Distributors

Inspire and Educate Investors and Distributors  
to Achieve Financial Success

## शेयर बाजार

पूरा ज्ञान तो कमाई आसान  
हम सिर्फ पढ़ाते नहीं, कमाना सिखाते हैं।



## Introduction

Are you passionate about empowering others and sharing your expertise in the mutual fund industry? The Certified Fund Trainer program is designed to equip you with the knowledge and skills to become a highly effective trainer, specializing in investor education and distributor training. From mastering key concepts to delivering impactful workshops, this comprehensive program will provide you with the tools and strategies to empower individuals and drive positive change in the industry.



## Course Highlights

- Mutual Fund Concept
- Mutual Fund Structure
- Regulators
- Investors Right

- ◉ Key Terms: NFO, SID, SAI, KIM, NAV and their relevance
- ◉ Understanding Risk and Returns
- ◉ Investing direct or through a distributor
- ◉ Why so many schemes?
- ◉ Define and understand your financial Goal
- ◉ Scheme Selections for best returns
- ◉ Sector Selection
- ◉ Portfolio Analysis
- ◉ KYC and Accounting
- ◉ Complete Financial and Goal Planning
- ◉ Training for helping candidates prepare for exam - NISM Series VA Preparation including the Mock test series
- ◉ NISM CPE Content Delivery Training
- ◉ SEBI Content Delivery
- ◉ Other IAP related trainings
- ◉ Scheduling a workshop
- ◉ Effective Query Handling
- ◉ Time Management
- ◉ Keeping Updated
- ◉ Key tips to keep every hour productive and chargeable

## Special Earning Opportunity:

### Unlock New Opportunities as a Certified Trainer!



As a Certified Fund Trainer, you have the opportunity to start your own training business under your own banner or get associated with us. We offer five distinct opportunities for trainers to expand their reach and impact in the industry:

1. Deliver CPE training to mutual fund distributors (compulsory for distributors)
2. Train candidates willing to invest in Mutual Funds
3. Train candidates willing to start a mutual fund distributor business
4. Conduct Investor Awareness Programs on behalf of SEBI, NSE, or any other Industry Body
5. Conduct preparatory training for banks and large distributors for their employees

## Flexible Learning Options



### Classroom Sessions:

Attend interactive in-person sessions led by experienced instructors.



### Live Online Sessions:

Join live virtual sessions conducted simultaneously with the classroom sessions, perfect for remote learners.



### Recorded Sessions:

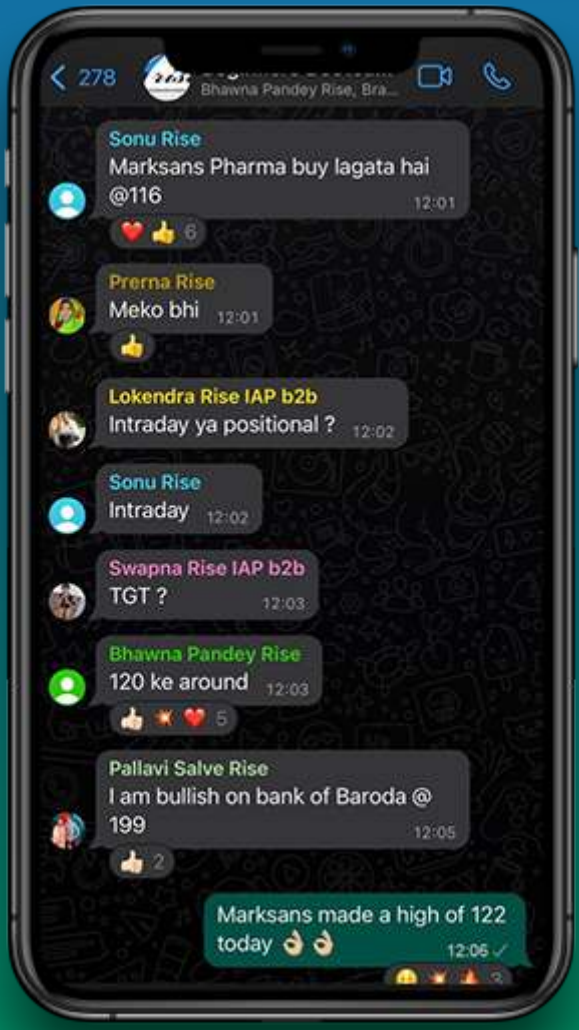
Access course content and recorded sessions on our mobile app, allowing you to learn at your own pace and convenience.





## Community Membership

Become a part of our exclusive community of learners and traders. Access an engaging platform where you can continue learning, share trade ideas, and connect with fellow participants even after the classes are over.





## Personalized Support

Benefit from personalized mentorship and support throughout the course to address your specific needs and questions.



## Career Opportunities

Discover exciting career opportunities in the financial industry as you gain expertise in the securities market.



## About Rise Excellence Academy

Rise Excellence Academy is a leading Stock Market Training Institute recognised by the **SEBI, NCDEX, NISM** and **NSE** for conducting training.



We are the only institute in Central India who has gained recognition from Industry regulators and Industry Giants. With a strong focus on financial education, we aim to increase employability and entrepreneurship ability among students by inculcating knowledge and developing skills. Our mission is to serve the society and nation by providing affordable and purposeful skills to the youth of India through meticulously drafted educational programs.



## Our Achievements

- Incorporation of Radical Institute of Stock Market Education in 2008, which later evolved into Rise Excellence Academy
- Awarded "Captains of the Industry" by Hon. Chief Minister Shivraj Singh Chouhan in 2015 for our commitment to financial literacy



- Signed a CPE Service Provider Agreement with the National Institute of Securities Market (NISM).
- Empaneled as a SMARTs Organization by SEBI for conducting Investor Awareness Programs across India.
- Empaneled for conducting Investor Awareness Programs on behalf of NSE and NCDEX.

## Our Core Strengths

At Rise Excellence Academy, we operate in three verticals in the financial education domain:



### A. Securities Market Certified Programs

Since 2008, we have been offering paid courses to participants, initially from our Indore Head Office. With the advent of technology, we now offer programs in hybrid mode across various cities in India, combining physical and online sessions.

### B. Investor Awareness Programs

We conduct Investor Awareness Programs across India on behalf of **SEBI**, **NCDEX (National Commodities and Derivative Exchange of India)** and **NSE (National Stock Exchange)**. Our experienced trainers, venue arrangements, and logistical support ensure the

### C. CPE Service Provider

Since 2016, we have been a **CPE Service Provider** with **NISM**, offering programs across India. These sessions adhere to **SEBI** and **NISM** guidelines, providing professionals in the securities market with valuable knowledge.

**Program duration 50+ Hours**  
+ Live Sessions

**Classroom Sessions**

**@11,999/-**

Attend the class + ask your doubts & questions...

**Live Sessions**

**@4,999/-**

Attend the live classroom at your home...

**Recorded Sessions**

**@2,999/-**

Office work / House work? Didn't get the TIME? Take a Recorded session and watch & Learn ANYTIME!

## Our Reach

We have the privilege to address various categories of participants, including:



### Corporates:

We work closely with corporates, conducting Investor Awareness Programs tailored to their needs.



### Government Organizations:

Collaborating with government bodies, we conduct Investor Awareness Programs at multiple levels for participants from diverse financial backgrounds.



## Education Institutes and Colleges:

We conduct workshops for faculties and students, fostering financial knowledge and career orientation.



## Professionals:

Through CPE Programs, IA Workshops, and joint workshops with intermediaries, we share best industry practices with professionals.



## Home Makers and Students:

Our sessions cater to individuals interested in trading and investment strategies, while students benefit from career-oriented programs.



## Teachers and Army Professionals:

We have the opportunity to share knowledge with school teachers, army professionals, and other groups through initiatives by NISM, RBI, and other bodies.



## SEBI Registered Intermediaries:

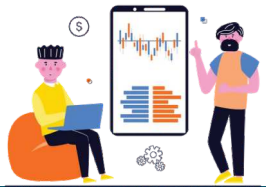
We serve as mentors, trainers, and consultants to various intermediaries.



## Recognition and Capacity

In 2015, we were honored as "Captains of the Industry" for financial literacy by the Hon. Chief Minister of Madhya Pradesh, Mr. Shivraj Singh Chouhan. Our dedicated team can conduct as many as 15+ sessions in a single day, ensuring a seamless learning experience for participants.

**Unleash Your Potential as a Certified Fund Trainer.**  
**Inspire and Educate Investors and Distributors to Achieve Financial Success**



Enroll in the Certified Fund Trainer program and become a highly skilled trainer, empowering investors and distributors to achieve financial success. Choose your path, whether it's starting your own training business or joining our esteemed network of trainers, and unlock the opportunities to make a significant impact in the mutual fund industry.





## Testimonials

I wanted to start trading in share market but I was not sure how to start, this course has worked as a complete tool for trading and investments. I am now able to select stocks for intraday trading and long term investments. I recommend this program to everyone who is willing to start trading or investing. This is the best investment you can make.

**-Priyanshi Jain**

I was trading markets since 6 months but sometimes I booked profits while some times I booked losses, I wanted to consistently earn from markets. My friend recommended RISE Institute to me, I did the program live which was for 20 days, I really liked the live sessions and knowledge level of faculties. I really appreciate their support not just in the course but also in the community membership through app. I really thank RISE for helping me remain in profits consistently.

**-Vijay Shukla**

I am studying graduation, trading in securities market was like a dream for me, I did an online course with RISE, this program is very detailed course on basics of securities market. It spiked my interest more and I started identifying and sharing investment and trade opportunities within the mobile app with other students and faculties, I did not trade any of them. I am very active in the community and have started trading on the trade opportunities I identify or provided by other students or faculties. I really appreciate RISE Institute, Keep up the good work!!

**-Ankur Singh**

## Other Courses that you will find interesting



**Beginner's Bootcamp**  
Mastering in the  
BASICS

**Options Elite**  
From Novice to Seasoned  
Option Trader



**Unlocking Value**  
The Art of Fundamental Analysis

**Mastering Mutual Funds**  
Maximising Returns with Mutual Funds



**Chart Master**  
The ultimate Technical  
Analysis Program

**MasterTrader Pro**  
The Ultimate Stock  
Market Mastery Course



**Preparatory Classes for NISM**  
Equity Derivatives, Mutual Fund  
Distributors, Research Analyst,  
Investment Advisors etc.





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