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Advisor / RM Training Program

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Designs an advisor or RM training program — modules (products, suitability and needs, compliance and conduct, sales skills, client servicing) with objectives, the certifications to hold (NISM, IRDAI where needed) and an ethics/no-mis-selling focus. Use this to build knowledgeable, ethical advisors. For which certifications each role legally needs use the Certification & Licensing Guide.

Purpose of this tool & output

Build knowledgeable, ethical advisors

How the output is used

Use the program to build knowledgeable, ethical advisors who sell suitably.

Important cautions

AI-generated program; ensure required certifications are held.

Companion documents

- BFSI Hiring Kit
- Certification & Licensing Guide
- Sales Incentive Scheme
- Conduct & Ethics Policy
- Performance Review Kit
- Attendance & Leave Policy

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.