

CFP® professionals CONNECT

(Newsletter Vol. 2 - October 2023 Edition)

"Welcome back to the second edition of our Newsletter! We are happy to reconnect with you and continue this journey of sharing knowledge, insights, and stories.

In our ever-evolving financial landscape, the importance of staying informed and financially literate remains as crucial as ever. Your ongoing presence and support mean the world to us, and we are grateful for the opportunity to be a part of your financial journey.

Let's embark on this next chapter together and thank you for being an essential part of our ongoing narrative."

-- *FPSB India Team*



Message from the CEO
-- Krishan Mishra

Dear CFP® professionals,

I hope this message finds you all in good health and high spirits. It gives me great pleasure to welcome you to the second edition of our newsletter.

Our first edition received an overwhelmingly positive response, and I want to extend my gratitude to everyone who contributed to its success. Our stories, insights, and updates brought FPSB India's vibrant culture and achievements to life, and I am confident that the second edition will continue to build on this momentum.

In this edition, we have a lot to celebrate and share:

New Achievements: We've achieved several significant milestones since the last edition. Let's take a moment to acknowledge and appreciate the hard work and dedication that made this possible.

Upcoming Initiatives: I'm excited to share details about upcoming initiatives on World financial planning day. Stay tuned for insights from our leaders about the initiatives and let's celebrate success together.

Employee Updates: We conducted our New employee induction, and we are sharing the glimpse of the same in this edition.

I encourage everyone to engage with the newsletter actively. Share your thoughts, ideas, and suggestions. Let's make this platform a true reflection of our vibrant CFP professional community.

I want to express my heartfelt appreciation for your unwavering commitment to FPSB India's success. As we move forward, let's continue to work together, support each other, and reach new heights of excellence.

Thank you for being a part of the CFP professional family and for making every day at work a rewarding experience.

CFP® CERTIFICATION PROGRAM UPDATES

Unlocking Financial Potential: FPSB India and 1 Finance sign an MoU!

FPSB India and 1 Finance, represented by Mr. Keval Bhanushali (MLESM), Co-founder & CEO, 1 Finance and Mr. Krishan Mishra, CEO, FPSB India respectively, have signed a Memorandum of Understanding (MoU). This partnership, rooted in a shared passion for financial planning, aims to elevate financial awareness and promote the significance of qualified financial advisory services to a wider audience.



Charting the Future: FPSB India Explores Partnership with IIM Mumbai

Mr. Krishan Mishra, CEO, FPSB India recently met with Prof. Manoj Tiwari, Director, IIM Mumbai, to explore potential collaborations. The aim is to jointly offer certificate programs in financial planning and management, aligning with India's growing financial sector. With the support of Prof. Rauf Iqbal and Prof. Utpal Chattopadhyay, this promises to be a fruitful partnership. Stay tuned for more updates!

Exciting Collaboration in the Making: FPSB India Meets with Mr. Joydeep Roy of PwC India

FPSB India engaged with Mr. Joydeep Roy, India Financial Services Advisory Leader and Global Health Insurance Leader at PwC India and a former Board Member of FPSB India. There was an in-depth discussion about the potential avenues for employment that await CFP professionals. Secondly, the conversation delved into strategies for enhancing the skillset of current PwC employees through the acquisition of CFP certification.



+ Revised Eligibility criteria in the Challenge Pathway!

Discover easier access to CFP certification with our revamped eligibility criteria. Your path to becoming a CERTIFIED FINANCIAL PLANNER® professional!

+ Important Fee Update: CFP certification Fees Adjusted for Quality and Compliance

Effective October 1, 2023, Specialist and CFP certification fees will be INR 8,600 + 18% GST. We appreciate your understanding as we ensure compliance and uphold certification quality. Your commitment to excellence is valued!





Experience a Seamless CFP certification Journey with Our Fresh LMS Look!

Our LMS portal has received a stylish makeover, enhancing your CFP certification journey. Dive into the new interface today! And, while you are at it, make sure to update your profile for a hassle-free experience.

Flexibility Meets Affordability: FPA & IFP in One Bundle!

Now, you can purchase the Financial Plan Assessment (FPA) and Integrated Financial Planning (IFP) i.e., CFP exam together. Plus, enjoy the flexibility to attempt them in your preferred sequence within 6 months from the purchase date. Optimize your learning journey today!



Recapping Our New Employee Induction Meeting

Welcoming Four New Members- Ms. Teena Rawal, Mr. Rajesh Singh, Mr. Girish Nair, and Ms. Himani Sharma! Our team just got stronger with their wealth of experience, ready to chart the course for financial planning excellence in India.

SPOTLIGHT NEWS! : Stories Shaping Our Community

Stay connected and informed with our news column, where we explore vital topics, share exciting updates, and give you an inside look at our organization's heartbeat. Dive in now!

Zee Business Article



Zee Business Interview



Economic Times Article



LinkedIn Post from FPSB India



LinkedIn post by 1Finance



LinkedIn Post by IIM, Mumbai





WORLD
FINANCIAL
PLANNING
DAY
HOSTED BY FPSB

As we celebrate World Financial Planning Day, FPSB India is preparing an exciting lineup of events.

Don't forget to follow us on our social media handles to stay updated on the latest developments and the exciting events we have in store!

For a sneak peek, you can visit this website link attached. 

To get the LIVE UPDATES - Follow us on our social media handles!



IOSCO WIW 2023 is organized with the support of the G20 Presidency of India.

#WFPD2023

#IOSCOWIW2023

#FPSBIndia

Guarding the Integrity of the CFP Mark

At FPSB India, maintaining the integrity and reputation of the CERTIFIED FINANCIAL PLANNER mark is of utmost importance to us. We take this opportunity to remind all our members and stakeholders about the significance of upholding the ethical use of the CFP mark.

Misusing or misrepresenting the CFP mark not only undermines its value but also reflects poorly on the entire financial planning community.

We urge all CFP professionals to diligently follow the guidelines provided by FPSB India when using the CFP mark in any communication or promotional material. Let us work collectively to preserve the credibility of the CFP mark and continue to elevate the standards of financial planning in India.

Remember, every correct use of the CFP mark contributes to building trust and confidence among clients, colleagues, and the wider public.

Thank you for your unwavering commitment to maintain the integrity of the CFP mark.

 For Marks Use Guidelines

Follow US On Our Social Media Handles

