

CFP® professionals CONNECT**(Newsletter Vol. 6 - February 2024 Edition)**

In this edition of our newsletter, we are thrilled to share the remarkable strides we have taken in building meaningful alliances and transforming financial futures. From signing an impactful MoU with esteemed institution, AIMA to dynamic engagements and insightful panel discussions, FPSB India is at the forefront of shaping financial planning education and professional development.

Explore our latest updates on the CFP® Certification Program, including key meetings with UGC and AICTE Chairmans, collaborative discussions with IIMs, productive sessions with Alliance University and much more! As we continue to redefine the landscape of financial planning education, the impactful engagements we have been a part of, from Digital-era Financial Planning workshops to enlightening sessions at renowned institutions like AIMT Noida, PES University, and OP Jindal Global University.

Stay tuned for more enriching experiences, opportunities, and updates that shape the future of financial planning in India.

-- FPSB India Team

Dear CFP® Professionals family,

As February unfolds, I wanted to take a moment to connect with all of you and share some thoughts as we progress further into the year. The start of 2024 has been filled with energy and promise, and it's invigorating to witness the collective efforts that define our company.

Our journey through January showcased the strength of our team, demonstrating resilience and an unwavering commitment to excellence. Whether you are a new member or a seasoned veteran, your contributions have woven a tapestry of success for FPSB India.

Looking ahead, February presents us with new opportunities and challenges. It's a month that calls for focus, collaboration, and a continued commitment to the values that make us who we are. As we navigate the ever-changing landscape of our industry, I am confident in our ability to adapt, innovate, and thrive.

In January 2024, I had the opportunity to represent you at the 40After40 Expo, the first Retirement Expo organised by Outlook Money. Retrospecting at my experience in this Expo, I can't help but feel a deep sense of gratitude and inspiration. I had the privilege of sharing the stage with some true industry giants - Nilesh Shah-MD Kotak AMC, Vishal Kapoor-CEO, Bandhan AMC, Ajit Menon, CEO, PGIM MF and Nidhi Sinha, Editor, Outlook Money. What struck me most was how our diverse experiences and insights came together to paint a vivid picture of the evolving retirement/financial planning landscape. At FPSB India, our mission is crystal clear - we're dedicated to taking financial planning to new heights through our CFP® certification. And you know what's fascinating? The Expo resonated strongly with this mission. It underscored the pressing need for exceptional financial planners. On a personal note, this event served as a powerful reminder of my unwavering commitment to financial education and empowerment.

I am proud of what we have accomplished together, and I am excited about the milestones we will achieve in the coming weeks and months. Remember, every challenge is an opportunity in disguise, and our ability to turn obstacles into stepping stones will be a testament to our strength as a team.

Thank you for your dedication and hard work. Let's make February a month of collaboration, creativity, and continued success. Together, we will build on our achievements and set new standards for excellence.



Message from the CEO
-- Krishan Mishra

📌 Towards Financial Mastery: FPSB India and AIMA's Transformative Partnership

FPSB India is delighted to announce a significant milestone with the signing of a crucial Memorandum of Understanding (MoU) with the esteemed All India Management Association (AIMA). This collaboration, signed by Dr. Ganesh Singh and Dr. Anuja Pandey of AIMA, aims to enhance cooperation in fostering financial planning expertise among students and professionals.

Together, we envision the development of financial planning programs, collaboration on events and professional development courses, and the identification of valuable research opportunities. This partnership is poised to empowering individuals with the knowledge and skills essential for a brighter financial future.



CFP® CERTIFICATION PROGRAM UPDATES

Advancing Education: FPSB India and UGC Chairman Explore Collaborative Horizons

In a groundbreaking meeting with University Grants Commission (UGC) **Chairman, Prof. Mamidala Jagadesh Kumar**, FPSB India engaged in a wide spectrum of collaboration opportunities. The discussions encompassed avenues for advancing financial planning education and professional development, reflecting a shared commitment to fostering excellence in the field.

With an optimistic outlook, FPSB India and UGC anticipate a collaborative endeavor marking a significant step towards creating a transformative impact in the realms of education and professional excellence.



Navigating Financial Paths: FPSB India and AICTE Chairman's Insightful Discussion

In a dynamic dialogue with All India Council for Technical Education (AICTE) **Chairman TG Sitharam**, FPSB India highlighted the universal importance of personal finance and financial planning across diverse fields. Emphasizing its significance in daily life, we shared inspiring examples of leaders championing this essential skill.

Dr. Abhay Jere, Vice-Chairman of AICTE and Chief Innovation Officer at the Ministry of Education (Govt. of India), presented FPSB India with an appreciation letter from the Ministry of Human Resource Development, acknowledging our contribution to the **School Innovation Ambassador Training Program (SIATP)**. Through this initiative, we successfully trained 50,000 school teachers nationwide, solidifying our commitment to advancing financial education on a broad scale.



Anticipating Alliances: FPSB India's Promising Meeting with IIM Ahemdabad

FPSB India had an enriching meeting with **Professor Joshy Jacob, IIM Ahemdabad**, featuring a productive discussion and an inspiring tour of the IIM Ahmedabad campus.

This immersive experience heightened our anticipation for potential collaborations, as we explore avenues to synergize efforts and contribute to the educational landscape in financial planning.



3

Setting the Stage: FPSB India's Important Meeting with IIM Bengaluru

In a pivotal meeting with **Professor Jayadev, Dean, and the IIM Bengaluru (IIMB) team**, FPSB India embarked on a significant discussion, exploring collaborative opportunities and defining the scope of potential joint initiatives.

The proactive engagement establishes the groundwork for a dynamic partnership aiming at a strategic alignment promising to bring about impactful contributions to the realm of financial planning knowledge and expertise.



4

Collaborative Horizons: FPSB India Explores Opportunities with Alliance University

In a productive session, FPSB India recently held a constructive meeting with Alliance University to explore collaborative opportunities.

The discussion revolved around identifying potential areas for partnership, setting the stage for future joint initiatives.

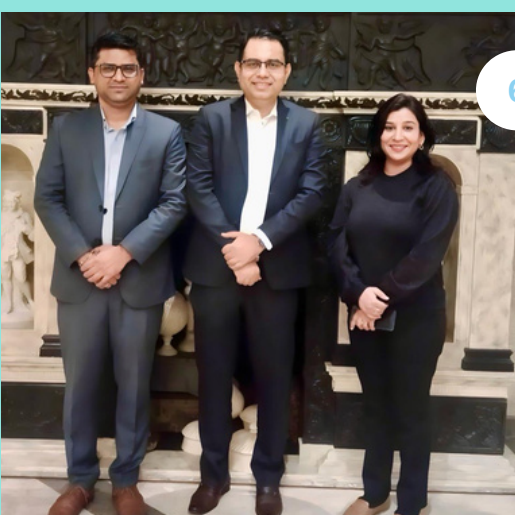


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Media Momentum: FPSB India Gains Support from Business Today's Teena Jain Kaushal

In a notable encounter, the FPSB India team had a fruitful meeting with **Teena Jain Kaushal, Editor-Personal Finance at Business Today**.

Discussions centered on FPSB India's vision, with Ms. Kaushal, a CFP® professional herself, expressing keen interest in supporting our initiatives. This collaborative interaction with a media powerhouse like Business Today marks a significant stride in advancing financial planning education and awareness.



6

📌 Important Update: Revised India-Specific Tax Planning Textbook for March and April Exams!

The India-specific Tax Planning textbook for the upcoming Retirement and Tax Planning Specialist (RTPS) exam in March 2024 and the CFP® Exam in April 2024 has been updated. Access the revised content on your LMS portal, where changes are highlighted.

Please note, the February series continues with the existing textbook, and the revised version is applicable from March onwards. Prepare thoroughly for the upcoming exams by familiarizing yourself with the enhanced content.



Challenge Pathway Now Renamed as Fast Track Pathway!

The Challenge Pathway is now officially named the Fast Track Pathway!

The Fast Track Pathway is designed to provide a quicker and more efficient route, ensuring a seamless and rewarding experience as you progress in your chosen field. Embrace this exciting update as we continue to enhance and optimize pathways for your success.



Engaging Futures: FPSB India's Dynamic Ventures in Financial Education



Empowering Educators: FPSB India's Key Role in AIMT's Faculty Development Program

FPSB India was invited for a collaborative workshop "**Investment Planning & Tax Management in Digital Era**" by Army Institute of Management and Technology (AIMT). The key insights of this workshop focused on wealth growth, risk and estate planning, retirement dreams, optimized insurance coverage, and savvy tax strategies.

Special sessions by industry leaders, including Mr. Krishan Mishra, CEO, FPSB India, and Mr. Arun Thukral, CFP®, Chairperson, CPAC Committee at FPSB India, made this 5-day Faculty Development Program (FDP) at AIMT Noida a resounding success, concluded with Krishan's Valedictory Speech and participant certificates distribution.

FPSB India Panelists Engage Students at PES University Event

FPSB India actively participated in a dynamic panel discussion on **"Opportunities in Financial Planning"** at PES University, Bengaluru. CEO Krishan Mishra and Regional Head for West and South India, Teena Rawal, shared valuable insights as panelists. Arjun Vardaraj, Founder & CEO of Arivupro, our new Authorized Education Provider, also contributed to the discussion, which was skillfully moderated by Prof. Vinod Krishna.

With an impressive turnout of over 400 students, the event, hosted by the Department of Management and Commerce at PES, underscored FPSB India's commitment to shaping the future of financial planning education.



Empowering Discussions: Krishan Mishra Highlights FPSB India's Goals at JGU Symposium

Capturing moments from the **O P Jindal Global University Industry Symposium** in Mumbai, where FPSB India's CEO, Krishan Mishra, played a pivotal role as a key speaker.

With an engaged audience of approximately 150 attendees from diverse profiles, Krishan addressed the event, shedding light on FPSB India's goals and vision. A dynamic and insightful session contributing to the dialogue on industry advancements.



Financial Empowerment: FPSB India CEO, Krishan Mishra, Guides Women Entrepreneurs at EDII Ahmedabad

Krishan Mishra, CEO of FPSB India, delivered an enlightening session on financial planning for **women entrepreneurship** at the Entrepreneurship Development Institute Of India (EDII) in Ahmedabad.

Invited by **Dr. Shukla, the Director General at EDII**, the inaugural session drew participants from 11 different countries, underscoring the global relevance of the topic. The engagement, particularly nostalgic as Mr. Mishra is an alumnus, also opened avenues for potential collaborations between EDII and FPSB India.

FPSB India and Fintram Global Explore Financial Planning Dynamics

FPSB India recently had a dynamic session with Fintram Global, emphasizing the significance of financial planning and CFP certification. The Q&A session, moderated by **Pankaj Dhingra, Co-Founder & Director, FinTram Global**, featured valuable insights from panelists Krishan Mishra CEO FPSB India and **Dr. Naela Jamal Rushdi, CFP®**.

The exchange of ideas covered industry trends, innovative approaches to financial planning, and discussions on investment strategies and regulatory updates, highlighting the commitment of CFP professionals to ensuring clients' financial well-being



Strategic Wealth Management Insights: FPSB India's Anshul Srivastava Guides Jaipuria Institute of Management Students

Anshul Srivastava, Assoc. VP (Standards and Certification) at FPSB India, delivered a comprehensive session in Jaipuria Institute of Management at their Jaipur-campus, **focusing on the significance of holistic financial planning in wealth management.**

Addressing MBA final year students specializing in finance, Anshul emphasized the role of a wealth manager in overseeing all facets of clients' personal finances. The session provided valuable insights into creating effective wealth plans for financial professionals in the making.



FPSB India Engages IIM Bengaluru in Dialogue on Financial Planning Education

Rajesh Singh and Teena Rawal from FPSB India recently conducted an enlightening session at IIM Bengaluru on the **"Significance of Financial Planning in Our Lives."** Rajesh emphasized the importance of Financial Planning education, discussing the cost, job opportunities, and entrepreneurship possibilities associated with the CFP program.

Teena delved into the need for financial planners, per capita income considerations, and how the CFP certification can pave the way for becoming top-notch financial planners. The session also touched upon life skills, referencing PM Narendra Modi's mention of financial planning, and highlighted the significance of the National Education Policy (NEP).



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Our inaugural session, "Dynamic Asset Allocation Strategies for Changing Markets," allows you to earn CPD points conveniently from your LMS portal.

Stay tuned for more transformative learning experiences throughout the year!

PLAY NOW!

Speaker

Mr. Akhil Chaturvedi, CFP®
Chief Business Officer, Motilal Oswal AMC



Speaker

Ms. Renu Maheshwari, CFP®
Co-Founder Finscholarz Wealth Managers



Moderator

Mr. Anshul Shrivastav, CFP®
Assoc. Vice President Standards and Certifications, FPSB India





"Wisdom from Titans: FPSB India's CEO Shares Retirement Insights at 40After40 Expo by Outlook Money"

At the groundbreaking 40After40 Expo by Outlook Publishing (India) Pvt. Ltd., FPSB India's CEO, Mr. Krishan Mishra, shared transformative insights on redefining retirement planning alongside industry giants like Nilesh Shah- MD Kotak AMC, Vishal Kapoor- CEO Bandhan AMC, Ajit Menon CEO PGIM MF, and Nidhi Sinha- Editor Outlook Money.

Key takeaways emphasized the mindset shift in retirement, advocating for early financial planning, diversification, generational consideration, and a lifelong commitment. The Expo proved to be a hub of innovative ideas, providing invaluable insights into the dynamic landscape of retirement planning and emphasizing the significance of a proactive and informed approach.



Cheers to our CFP Professionals!
Proud representatives at the Financial Planning Lounge during the 40After40 Expo, offering valuable guidance and insights



Yukti Gada CFP®



Anshul Srivastava CFP®



Sucheta Bhirud CFP®



Jinal Mehta CFP®



Himanshu Mayne CFP®



Sweta Singh CFP®

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[LinkedIn Post : Budget Insights by Krishan Mishra](#)



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.

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