

# CFP® Professionals CONNECT

NEWSLETTER

VOLUME 8 - APRIL 2024 EDITION

## *Message from the* **CEO**

Dear CFP® Professionals family,

Hope you are well.

As we step into April, I'm delighted to share some updates and insights with all of you.

Despite the ongoing challenges we face, our collective efforts continue to propel us forward towards our goals. Let's dive into some highlights:

We've achieved significant milestones in the month of March, thanks to the dedication and hard work of the FPSB India team and your support. We have been able to onboard our first IIM-Indian Institute of Management, Bengaluru. We shall be launching new joint programs, events, research as well as giving a recognition to some IIM-B courses for our CPD points. We also signed an MOU with the Manipal School of Banking, one of the top institutions of our country who have been supporting the BFSI industry talent requirements since last 15 years. We are planning a few new initiatives which will become a benchmark for our students as well as the CFP professionals in times to come. We also did a webinar during the Global Money week wherein we had Senior CFP professionals who shared their views on the topic "Financial Foundations for Youth: How Early Financial Awareness Sets You Ahead" the same was attended by existing as well as aspiring CFP Professionals across the country.

Looking ahead, we are looking forward to seeing you at our first event of 2024 on 13th April in India Habitat Centre Delhi. We are organizing this event in association with AIMA (All India Management Association), you will be able to meet and hear from the industry stalwarts and media professionals, who will talk about the roadmap for our profession in times to come.

As always, my door is open to your ideas, feedback, and concerns. Your input is invaluable, and I encourage you to reach out to me or your respective managers with any suggestions or questions you may have.

In closing, I want to express my appreciation for your unwavering dedication and resilience. Together, we will continue to achieve new heights of success.

Thank you for your continued hard work and commitment.

Best Regards,  
Krishan Mishra



# CFP® Certification Program: News Updates



## Empowering Partnerships: FPSB India and IIM Bangalore Collaborate to Enhance Financial Planning Education

FPSB India has established a significant partnership by signing a monumental Memorandum of Understanding (MoU) with Indian Institute of Management Bangalore (IIMB), under the leadership of Prof. Rishiksha Krishnan, Director of IIMB, with the aim of advancing financial planning education and professional development. This collaboration introduces an Executive Program tailored for both working professionals and students, reaffirming the commitment to foster financial sustainability in India.

Furthermore, FPSB India will offer 5 scholarships for CFP certification aspirants, in addition to jointly creating CPD points resources and organizing initiatives and events to improve access to education and training for those pursuing careers in finance.



## Empowering Futures: FPSB India Teams Up with MABFSI for Financial Excellence

FPSB India and Manipal Academy of BFSI (MABFSI) have entered into a Memorandum of Understanding (MoU). Robin Bhowmik, Chief Business Officer of Manipal Academy of BFSI, expressed excitement about enhancing professional financial planning services nationwide through this collaboration.

The MoU includes provisions to offer CFP certification to MABFSI students and alumni, aiming to equip BFSI students with the essential skills and certifications required for career advancement in the financial services sector. Moreover, this collaboration opens avenues for impactful B2B engagements within the BFSI sector, fostering growth and innovation.



## Empowering Professionals: FPSB India and COFP Join Hands for CPD Initiatives

FPSB India is pleased to announce the signing of an MoU with the Council of Financial Planners Bengaluru (COFP), represented by B Srinivasan- Founder COFP, A Suresh- President COFP, and Mr. Yuvaraja, Mentor & Advisor COFP.

This collaboration will facilitate joint activities and initiatives, including the provision of CPD points for CFP® professionals, furthering our commitment to enhancing financial planning standards and expertise.



# CFP® Certification Program : New Initiatives and Developments

## CEO Krishan Mishra Engages with Manipal Academy Faculty, Strengthening Collaboration

Krishan Mishra, CEO of FPSB India, recently held an interactive session with faculty members of Manipal Academy following the recent MoU signing.

The engaging session was highly appreciated by the faculty, signaling a promising boost to our partnership and collaborative efforts.



## FPSB India Team Inspires Future Financial Planners

Rajesh Singh, from FPSB India, delivered an enlightening session at Xavier Institute of Management and Entrepreneurship (XIME) in Bengaluru on Financial Planning's importance and the role of CFP Professionals, focusing on Estate Planning and Retirement planning.

Meanwhile, Anurag Rana conducted a session at Biyani Girls College in Jaipur, igniting enthusiasm among aspiring young minds to embark on their journey with CFP certification.



## Seamless Transactions: Simplified International Payments Now Available

Good news for our members! The payment gateway for transactions has been streamlined, eliminating the need to enable International transactions on your Debit/Credit Card when using the student portal or renewing your CFP certification.

Enjoy hassle-free payments with ease and convenience.

**UPDATE**



## Farewell Wishes: FPSB India Bids Adieu to Pushkar Chugh

In a warm and heartfelt gathering, the FPSB India team came together for a memorable dinner to bid adieu to Pushkar Chugh, a valued member of the team. The Team wished him the very best for his future endeavors, with expressions of gratitude for his contributions and friendship.

The evening served as a reminder of the strong connections forged within the FPSB India family, even as individuals embark on new journeys.



ASPIRE SUMMIT 2024

LEADERSHIP  
IN FINANCE

## Celebrating Collaboration: A Memorable Event with ARIA and K J Somaiya Institute of Management, Mumbai



Many thanks to ARIA for hosting an unforgettable event, with FPSB India serving as the Knowledge Partner. The presence of FPSB India Team Members- Alok Kumar, Teena Rawal and Saniya Chawan and Arun Thukral (left to right) along the students from K J Somaiya Institute of Management, Mumbai, infused the occasion with vibrant energy and a thirst for knowledge, elevating the experience for all involved.

This collaboration wasn't just about sharing knowledge; it was about fostering a community of eager learners and future leaders.

A sincere thank you to ARIA, the students, and everyone who contributed to the success of this event. Let's continue to embrace learning and collaboration as we move forward together.



## AVAILABLE NOW Journal of Financial Planning in India : March 2024 Edition

Explore the March 2024 edition of the Journal of Financial Planning in India – curated by our esteemed CFP® professionals, offering unparalleled insights and expertise into the dynamic world of finance.

EARN 4 CPD POINTS ON YOUR LMS PORTAL!



CLICK HERE



Hoping you're Onboard!! 5 DAYS TO GO!

FPSB INDIA  
IN ASSOCIATION WITH

AIMA  
ALL INDIA MANAGEMENT ASSOCIATION

PRESENTS

## FUTURE OF FINANCIAL PLANNING PROFESSION: CHALLENGES AND ROADMAP

13th April 2024  
Saturday

01:00 PM - 06:00 PM

Explore the depths of financial empowerment with FPSB India and AIMA leading the way, offering unparalleled guidance through the intricacies of financial planning.

India Habitat Centre, Lodhi Road

NEW DELHI

#FPSBIndiaSummit2024

# KNOW YOUR *Speakers*

## INAUGURAL SPEECH

**Mr. Krishan Mishra**

CEO of FPSB India



**RAJENDRA SRIVASTAVA**  
Executive Director  
ISB Institute of Business Innovation,  
CBM, EFPM



**Prof. (Dr.) Rohit Singh**  
Director, Centre for  
Management Education, AIMA



**DR. ANUJA PANDEY**  
Program Director -PGCM | Head  
India Case Research Centre- ICRC AIMA

### PANEL DISCUSSION - 1

Skill Sets Shaping the Future of Financial Planning



Time  
02:45 PM TO 03:45 PM



**Speaker**

**MANDEEP SINGH**

Director, World Education Services (WES)



**Speaker**

**GURPREET SIDANA**

CEO - Religare Broking Ltd



**Speaker**

**NEHA SONI**

Regional Talent Head- EMESA (MBB)



**Speaker**

**SHAILESH KUMAR**

Co Founder and Insurance Head  
- Insurance Samadhan



**Moderator**

**RAJESH KRISHNAMOORTHY**  
Independent Director - Board of PGIM

### PANEL DISCUSSION - 2

Impact of AI & New Technology in Financial Planning Profession



Time  
03:45 PM TO 04:45 PM



**Speaker**

**ANIL CHOPRA CFP®**  
Director - Bajaj Capital  
Ltd Group



**Speaker**

**DR RAVI KUMAR JAIN**  
Director - Sparsh Global  
Business School



**Speaker**

**PRATIK PRIYADARSHI**  
Prof. of Insurance & Risk  
Management - BIMTECH



**Speaker**

**NANDAN MISHRA**  
Founder & CEO - Algo8 AI



**Moderator**

**ARUN THUKRAL CFP®**  
CPAC Chairman - FPSB India

### PANEL DISCUSSION - 3

Breaking the Mold- Unconventional Career Opportunities after CFP® certification



Time  
04:45 PM TO 05:30 PM



**Speaker**

**APRAJITA SHARMA**  
Assistant Editor, Mint &  
co-author of Big Bull of Dalal Street



**Speaker**

**NIDHI SINHA**  
Editor, Outlook Money



**Speaker**

**TEENA JAIN KAUSHAL**  
Editor-Personal Finance,  
Business Today



**Speaker**

**TEENA RAWAL**  
Regional Head - West and  
South India



**Moderator**

**AMIT GUPTA**  
Founder of The Repro

## Boost Your Financial Knowledge:

- ✓ **Gain Wisdom from Industry Leaders:** Learn from the forefront of financial planning.
- ✓ **Stimulating Conversations:** Participate in discussions that provoke thought and ignite inspiration.
- ✓ **Forge Connections:** Network with like-minded individuals driven by shared aspirations.
- ✓ **CFP® Professionals attending the summit get an opportunity to earn 5 CPD credits!**

*Get ready to be inspired!*

**For an event that promises an unforgettable journey of enrichment and excitement!**



# GLOBAL MONEY WEEK

Tune in to our exclusive Global Money Week 2024 Special Webinar.

Opportunity to earn CPD points for CFP Professionals via LMS portal!

#ProtectYourMoney#SecureYourFuture  
#GlobalMoneyWeek2024 #GMW2024

## GLOBAL MONEY WEEK SPECIAL WEBINAR FINANCIAL FOUNDATIONS FOR YOUTH How Early Financial Awareness Sets You Ahead



**Speaker**  
Suresh Sadagopan, CFP®

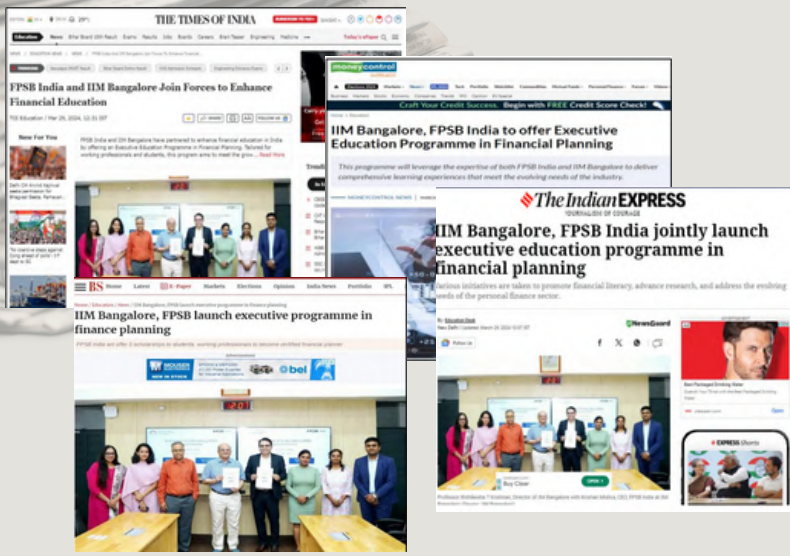
**Moderator**  
Alok Kumar, Ph.D, CFP®

**Speaker**  
Ritesh Sabharwal, CFP®

**WATCH NOW**


## SPOTLIGHT NEWS! *Stories Shaping Our Community*

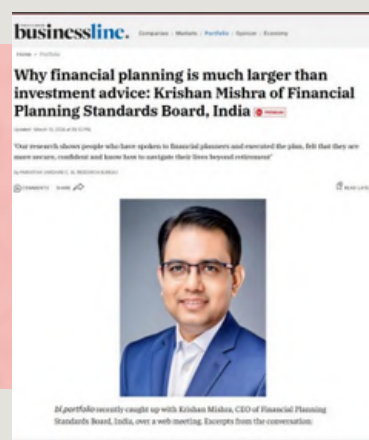
Stay engaged and up-to-date with our news column, delving into essential topics, sharing thrilling updates, and offering an insider's perspective on our organization's pulse.



### FPSB India Signs MoU with IIMB

-  [The Times of India Article](#)
-  [Money Control Article](#)
-  [Business Standard Article](#)
-  [The Indian Express Article](#)


 The Hindu Business Line extended their outreach by conducting a virtual interview with the BL Portfolio editor. Titled "Why Financial Planning Extends Beyond Investment Advice," the interview featured Krishan Mishra, discussing the latest CFP statistics, the qualification process, and employment opportunities both in India and globally.

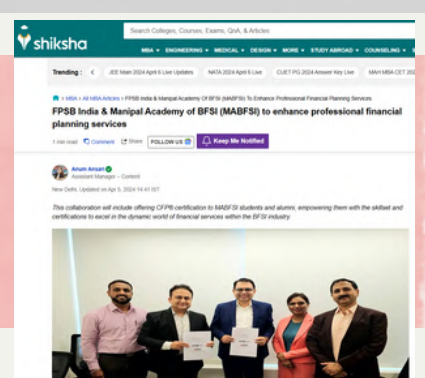


The interview was conducted by Parvatha Vardhini C, the Editor - BL Portfolio at the Hindu Business Line.



 In the Economic Times, The Morning Brief Podcast: Mr. Krishan Mishra discussed the topic - "Decoding doom spending and loud budgeting and spoke about Gen Z's spending and saving habits in a candid chat" with ET Podcast journalist Shabori Das. He was featured alongside Mr. Manish Maryada - Founder & CEO at Fello, and ET's Alekh Angre.

 Shiksha.com featuring FPSB India and Manipal Academy of BFSI (MABFSI), joining forces to elevate professional financial planning services. This partnership entails providing CFP® certification opportunities to MABFSI students and alumni, equipping them with the necessary skills and certifications to thrive in the ever-evolving landscape of financial services within the BFSI sector.



### Other Interesting Articles

- [Times Now Article](#) 
- [Rozgar.com Blog](#) 
- [Career India Article](#) 
- [The Indian Express Article](#) 



## 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.

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

 [For Marks Use Guidelines](#)

## Testimonials

"I am extremely pleased with the CERTIFIED FINANCIAL PLANNER® program by FPSB India. As an accomplished Chartered Accountant and Company Secretary, the program provided a crucial missing piece in Personal finance and goal planning.

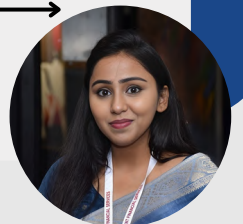
The curriculum's depth, dedicated mentors, and emphasis on ethics make FPSB India a standout choice for professionals seeking excellence in financial education. Highly recommended!"

B S Jolly CFP®



"FPSB India's CFP® program has been nothing short of a professional transformation for me. The meticulously crafted curriculum provided a profound understanding of financial planning profession. The global recognition from FPSB India has not only elevated my professional standing, but has also opened doors to a world of opportunities. Becoming a CFP professional, was undoubtedly a pivotal moment that has significantly enhanced my capabilities and positioned me as a leader in the field of financial planning"

Nima Gupta CFP®



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