



CFP® Professionals CONNECT

NEWSLETTER

VOLUME 9 - MAY 2024 EDITION

Message from the CEO

Dear CFP® Professionals family,

As we journey through another month of challenges and triumphs, it's essential to pause and reflect on our collective achievements. May has arrived, and with it, a list of accomplishments that remind us of our commitment to excellence.

First and foremost, I'm thrilled to inform you that our first event which was organised on April 13th at Delhi showcased a very strong participation from our CFP professionals, students, industry and media. I would like to thank each one of you in making this a great success.

In addition to this, we have also made remarkable strides in our community engagement efforts. We signed the top business school of our country the Indian Institute of Foreign Trade, as a proud alumnus of the Institute it gives me immense pleasure to inform you that this partnership will bring a great opportunity for us to create a new set of CFP Professionals who will go through our curriculum along with their regular MBA. We are also bringing some good short-term courses to fulfil your CPD requirements with the Institute.

Looking forward, we have an exciting roadmap ahead of us. Our upcoming event at Bengaluru brings and opportunity for you to learn about the practicing challenges and also brings the promises to revolutionize the industry and redefine the way our customers experience our financial planning efforts. With your expertise and creativity, I have no doubt that we'll exceed expectations once again and solidify our position as industry leaders.

As we celebrate these achievements and look ahead to the future, let's remember to stay focused, stay united, and stay true to our core values. Together, there's no limit to what we can achieve.

Thank you for your hard work, dedication, and continuous support.

Here's to many more successes in the days, weeks, and months to come.

Best Regards,
Krishan Mishra



CFP® Certification Program: News Updates



 A Big Move! FPSB India and IFSCA Officially Join Forces to Elevate Financial Services Landscape in India

FPSB India recently signed a monumental MoU with the **International Financial Services Centres Authority (IFSCA)**, the regulatory body overseeing Indian special economic zones in India. This momentous occasion took place in the presence of esteemed dignitaries including **Kalyanaraman Rajaraman, Chairperson IFSCA**, Pradeep Ramakrishnan, Executive Director IFSCA, Dr. Dipesh Shah, PRAVEEN TRIVEDI, and Akshay Ganeriwala.

Through close collaboration, we shall bolster a skilled influx of CFP® professionals to meet GIFT City's dynamic financial sector needs. Together, we aim to cultivate financial market growth at GIFT IFSC by nurturing expertise in financial planning. Additionally, our alliance will lead joint research initiatives to delve into global financial trends and critical areas.




 Empowering Futures: FPSB India and IIFT Join Forces for Financial Education

FPSB India Signs another significant MOU with Indian Institute of Foreign Trade (IIFT) Across All Campuses!

This milestone, achieved in the presence of **Pramod K. Gupta Registrar at IIFT**, signifies a significant advancement in our journey.

Embark on a transformative journey with our Executive and Regular Postgraduate Programs, integrating CFP certification, offering holistic financial planning education, and recognizing IIFT short-term courses for CPD credits!



 FPSB India Forges Partnership with Sydenham Institute (SIMSREE), Mumbai: Exciting Developments Ahead!

FPSB India proudly announces the signing of an MOU with Sydenham Institute of Management Studies, Research and Entrepreneurship Education (SIMSREE), one of Mumbai's top three management institutes, in the presence of **Mr. Shrinivas Dhure, Director at SIMSREE**.

Our collaboration underscores our dedication to empowering professionals with top-tier financial education and practical experiences, meeting the growing demand for advanced learning in financial planning.



Advancing Financial Education: FPSB India Signs MoU with GL Bajaj Noida

FPSB India Expands Collaboration with GL Bajaj Noida by signing an MoU in the presence of **Dr. Sapna Prakash, Director at GL Bajaj Noida.**

Under this partnership, upcoming MBA students will embark on studying for the CFP® certification qualification, marking a significant stride towards enhancing financial education and professional development.



CFP® Certification Program : Initiatives and Developments



FPSB India and IIM Lucknow Explore Collaborative Opportunities in Financial Education

FPSB India Team initiates discussions with **Prof. Suresh Jhakar, Chairperson PG Programmes Faculty at IIM Lucknow,** to Forge Pathways in Financial Planning Education.

Through this engagement, we aim to synergize expertise and resources, paving the way for innovative educational initiatives and collaborative ventures. Stay tuned for updates as we embark on this journey to elevate career prospects.

FPSB India's Anurag Rana Sparks Dialogue at Maharishi School for Career Enrichment

Anurag Rana, Sr. Manager - Business Development at FPSB India, leads a compelling discussion at **Maharishi School of Business & Management** on financial planning career prospects, alongside our Authorised Education Provider, ICOFP.

This collaboration not only enriches educational outreach but also opens doors for strengthening the relationship between FPSB India and educational institutions, fostering long-term partnerships focused on fostering professional development and industry-relevant skills.



System Update: Easily Earn and Update CPD Points via LMS Portal!

Now, fulfilling the required 15 CPD points is more convenient than ever with our LMS portal. Plus, you can seamlessly upload External CPD points from eligible activities outside journals and webinars.

This enhancement simplifies the renewal process, offering our members greater flexibility and convenience. Stay current with your certification—don't miss out on this streamlined renewal experience!

UPDATE



EPISODE 2

FROM POCKETS TO PORTFOLIOS

CEOs' Personal Money Management Journeys!



WATCH NOW



GUEST



Sumit Rai

MD & CEO of Edelweiss Tokio Life Insurance

HOST



ARUN THUKRAL CFP®

CPAC Chairman - FPSB India

**Dive into Financial Brilliance!
Watch the 2nd Episode of
'From Pocket to Portfolio' Series!**

**Featuring Special Guest : Sumit Rai MD & CEO
Edelweiss Tokio Life Insurance
Unleashing 25+ Years of Life Insurance Mastery!**

**Opportunity to earn 2 CPD points for
CFP® Professionals via LMS portal!**

FPSB India Summit 2024 QUICK RECAP....



Gratitude to All Attendees of the FPSB India Summit 2024!

Your participation marked a significant milestone, fostering both learning and collaborative success, enriching our CFP® Professionals community profoundly. A heartfelt thank you to our esteemed panelists and moderators for enlightening us on trending and vital topics in our field.

We extend special appreciation for our partnership with AIMA in the launch of the new PG Diploma in Financial Planning—a pivotal move empowering individuals to thrive in this ever-evolving industry of financial services!

Special thanks to Krishan Mishra CEO FPSB India, Prof Rajendra Srivastava Executive Director ISB Institute of Business Innovation, Prof (Dr.) Rohit Singh Director CME AIMA and Dr. Anuja Pandey Program Director AIMA (from left to right) for their enthusiastic participation and unwavering support in ensuring the seamless execution of this event.



Panel Discussion 1 : Skill Sets Shaping the Future of Financial Planning



Reflecting on Panel 1's engaging discussion on 'Skill Sets Shaping The Future Of Financial Planning' at the FPSB India Summit 2024, we extend our heartfelt gratitude to our esteemed panelists, Rajesh Krishnamoorthy, Gurpreet Sidana, Neha Soni and Shailesh Kumar (from left to right).

Their insights into essential skills, from technical mastery to emotional intelligence, provided invaluable guidance to attendees, empowering them to navigate and excel in the evolving landscape of financial planning.

Panel Discussion 2 : Impact of AI & New Technology in Financial Planning Profession



Following Panel 2's insightful exploration of 'Impact Of AI & New Technology In Financial Planning Profession' at the FPSB India Summit 2024, we extend our sincere appreciation to our esteemed panelists, Arun Thukral CFP®, Pratik Priyadarshi and Anil Chopra CFP® (from left to right).

Their expertise shed light on the transformative potential of AI in reshaping financial planning, inspiring attendees to envision and embrace a future where technology enhances and expands the role of financial advisors.



Panel Discussion 3 : Breaking the Mould- Unconventional Career Opportunities for CFP Professionals



Reflecting on Panel 3 of the FPSB India Summit 2024, we extend our heartfelt gratitude to our esteemed panelists, Amit Gupta, Teena Jain Kaushal CFP®, Teena Rawal, Aprajita Sharma CFP® and Nidhi Sinha (from left to right).

Their insightful discussions on 'Breaking The Mold - Unconventional Career Opportunities After CFP® Certification' illuminated new pathways and possibilities in the finance industry, inspiring attendees to explore innovative avenues and redefine success.



[CLICK HERE FOR MORE PICTURES](#)

SAVE THE DATE!

JOIN US NEXT IN
BENGALURU
5th JULY 2024

Follow us on our Social Media Handles for latest updates!



Celebrating Excellence!!

FPSB India's Team Celebrates Achievements and Plans for the Future

FPSB India recently held a momentous Recognition & Rewards Ceremony, honoring the outstanding achievements of our dedicated team members. This heartfelt event celebrated their unwavering commitment and exceptional contributions, showcasing the consistent excellence displayed in every aspect of their work.

We extend our deepest appreciation to each team member for driving FPSB India's success in the financial planning industry.

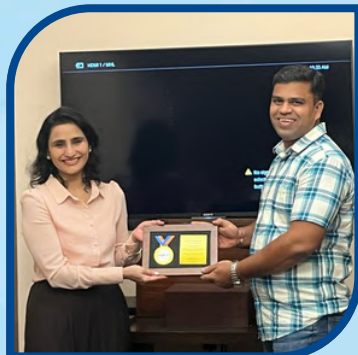
Special thanks to Neha Soni, Regional Talent Head EMESA (MBB), for her invaluable presence, presenting awards, and sharing her insights.

Following this celebration, FPSB India convened for its Strategic Meet for the year 2024-25. This pivotal team gathering allowed us to align visions, set strategic goals, and chart the course for our growth and development in the coming year.

Discussions focused on innovative initiatives, market trends, and industry challenges, aimed at strengthening our impact and advancing the financial planning profession in India.

As we look ahead, we eagerly anticipate future milestones and successes as a unified team, fortifying FPSB India's mission and paving the way for continued growth and impact.

KUDOS TO THE TEAM!



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 IFSCA

 [Press Trust of India \(PTI\)](#)

 [NDTV Profit](#)

 [Business Standard](#)

 [BWC CFO World](#)

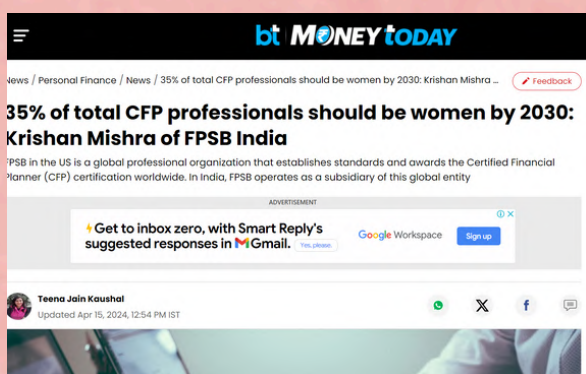
FPSB India and IFSCA sign an MoU




Ahmedabad, FPSB India, the country's leading professional standards-setting body for financial planning, and the International Financial Services Centres Authority (IFSCA), in GIFT IFSC, Gandhinagar signed an MoU to elevate Gujarat International Finance Tec-City (GIFT) IFSC as a premier 'Global Finance Hub' and strengthen its talent pool of skilled professionals tailored to meet the evolving demands of GIFT City's financial industry. Under this strategic collaboration, FPSB India and IFSCA are set to embark on a transformative journey aimed at enhancing the financial market ecosystem and nurturing skilled professionals for GIFT City's expanding financial workforce. Speaking of FPSB India's commitment to the financial sector in the country, Krishan Mishra, CEO of FPSB India, said, "This collaboration marks a significant milestone in our mission to cultivate a strong talent pool equipped with globally recognized financial planning expertise. By collaborating our efforts with IFSCA, we aim to empower professionals and contribute to the evolution of GIFT IFSC as the foremost destination for financial services in India." Dipesh Shah, Executive Director of IFSCA, said, "We want to facilitate institutions which can play important role in developing talent pool at GIFT IFSC. FPSB India will definitely infuse fresh synergies in advancing the financial services ecosystem at GIFT IFSC. Through joint initiatives and knowledge sharing, we are poised to catalyse innovation and position GIFT IFSC as a hub of new age global financial services."

FPSB India and IFSCA sign an MoU to Foster Talent Development and Promote GIFT IFSC as a 'Global Finance Hub'


Ahmedabad, FPSB India, the country's leading professional standards-setting body for financial planning, and the International Financial Services Centres Authority (IFSCA), in GIFT IFSC, Gandhinagar signed an MoU to elevate Gujarat International Finance Tec-City (GIFT) IFSC as a premier 'Global Finance Hub' and strengthen its talent pool of skilled professionals tailored to meet the evolving demands of GIFT City's financial industry. Under this strategic collaboration, FPSB India and IFSCA are set to embark on a transformative journey aimed at enhancing the financial market ecosystem and nurturing skilled professionals for GIFT City's expanding financial workforce. Speaking of FPSB India's commitment to the financial sector in the country, Krishan Mishra, CEO of FPSB India, said, "This collaboration marks a significant milestone in our mission to cultivate a strong talent pool equipped with globally recognized financial planning expertise. By collaborating our efforts with IFSCA, we aim to empower professionals and contribute to the evolution of GIFT IFSC as the foremost destination for financial services in India." Dipesh Shah, Executive Director of IFSCA, said, "We want to facilitate institutions which can play important role in developing talent pool at GIFT IFSC. FPSB India will definitely infuse fresh synergies in advancing the financial services ecosystem at GIFT IFSC. Through joint initiatives and knowledge sharing, we are poised to catalyse innovation and position GIFT IFSC as a hub of new age global financial services."




 As reported by Teena Jain Kaushal, Editor-Personal Finance at Business Today, FPSB India, under the leadership of CEO Krishan Mishra, aims to achieve a 35:65 ratio of women-to-men CFP Professionals by 2030. Initiatives to promote diversity include strategic partnerships with institutions like the Indian Institute of Foreign Trade (IIFT) and IIM Bangalore, focusing on bridging the gap between theoretical learning and practical application in financial planning.



FPSB India Signs MoU with IIFT

-  [Press Trust of India \(PTI\)](#)
-  [ET BFSI : Economic Times](#)
-  [The Pioneer](#)
-  [Career India](#)
-  [India TV](#)



 BW CFO World announces a record high in CFP Professionals worldwide, with over 223,770 CFP Professionals as of December 31, 2023, marking a 5.1% increase from the previous year. Pankaj Dhingra, Co-Founder of FinTram Global, underscores the program's role in addressing industry challenges, preparing candidates for professional roles. FPSB's exponential growth since 2004 reflects the universal appeal of CFP certification, emphasizing rigorous standards and client-centric practices globally.



Financial Planning Standards Board (FPSB) Announces Record Number of CFP Professionals Worldwide
FPSB announced a record number of Certified Financial Planner (CFP) professionals worldwide. As of December 31, 2023, there were over 2,23,770 CFP professionals globally, representing a 5.1 per cent increase from the prior year.

Other Interesting Articles

-  [Business Outlook India Article](#)
-  [TV9 Hindi Article](#)
-  [Business Today 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

"Becoming a CERTIFIED FINANCIAL PLANNER® has been a transformative journey. It's not just about gaining knowledge; it's about honing the skills to positively impact lives. Through rigorous training and dedication, I've cultivated expertise in financial planning, investment strategies, and ethical standards.

This journey has not only equipped me with the tools to navigate complex financial landscapes but has also instilled a deep sense of responsibility to guide clients toward their financial goals with integrity and compassion."

→
Chahat Sinha CFP®



"The CFP® Certification program has transformed my career, giving me the expertise to confidently navigate intricate financial environments. From analysing investment opportunities to crafting comprehensive retirement plans, the certification has empowered me to provide invaluable guidance to clients, helping them secure their financial futures. It's been instrumental in advancing my career trajectory and establishing myself as a trusted advisor in the financial industry. We have established our own setup with named as KULKARNI INVESTMENTS and we have more than 500+ families who are seeking financial advice from us."

→
Atul Kulkarni CFP®



FOLLOW US ON OUR SOCIAL MEDIA HANDLES

