

CFP® Professionals CONNECT

NEWSLETTER

VOLUME 10 - JUNE 2024 EDITION

Message from the CEO

Dear CFP® Professionals family,

As we enter the month of June '24, I want to take a moment to reflect on our journey so far and share some exciting developments on the horizon. The efforts, hard work, dedication, and innovative spirit you have shown for the financial planning profession has been the driving force behind our continued success. Together, we have achieved remarkable milestones, and I am incredibly proud of what we have accomplished as a family.

Some of our key achievements in the month of May are as mentioned below:

- We signed MOU with International Financial Services Centers Authority (IFSCA), the unified financial services regulator for GIFT city. We will be supporting the GIFT city talent requirement through our CFP® certificants there. This will be a significant step towards the employability as well as practicing opportunity for our CFP professionals.
- We also signed an MOU with Insurance Institute of India (III) there by giving an opportunity to fellow members of III to get into CFP professionals community through fast-track mode. This also opens the door for our CFP professionals to upgrade their Insurance knowledge and certification requirements.
- We organized an important webinar on the topic She Plans, She Leads, We Prosper! The Role of Financial Independence for Women in New Bharat, which was attended by Ms Prableen Bajpai CFP®- Founder FinFix Research, Ms. Swati Kumari BWealthy- Youtuber, Financial coach & Ex anchor CNBC Awaaz and moderated by Ms Himani Sharma, FPSB India. The event saw an attendance of more than 190 people, which is significant.



The second half of the year promises to be just as dynamic and rewarding. Here are some key initiatives we will be focusing on:

- Expansion and Market Penetration: We are exploring new markets and opportunities to expand our footprint across the country. This will involve strategic partnerships to drive growth and enhance our competitive edge.
- Bootcamp on how to setup your CFP® Practice: We are organizing this Bootcamp in association with IIM Bangalore and we look forward to seeing you at IIM Bengaluru campus on July 5th, 2024.
- CPD opportunities- Through our new initiatives we are bringing together a few new CPD opportunities for you through our partner Institutions. This will be shared with you due course of time.

Thank you for being part of this incredible journey. I am excited about what lies ahead and confident that, together, we will achieve even greater heights.

-- Krishan Mishra

CFP® Certification Program: Latest Updates

FPSB India Partners with Insurance Institute of India (III) for Fast-Track CFP® Certification Pathway



FPSB India is thrilled to announce a strategic partnership with the Insurance Institute of India (III), witnessed by **S N Satpathy, Secretary General at III**, and **Dr. Ramesh Satuluri, Faculty Research at III**.

This collaboration offers a Fast Track Pathway for III Fellows to become **CERTIFIED FINANCIAL PLANNER®** professionals, alongside joint research initiatives and co-curated learning opportunities.

Together, we aim to revolutionize professional development in the insurance and financial planning sectors, creating unparalleled opportunities for growth and learning.

Seminar on Financial Empowerment at Universal Grants Commission (UGC) office

FPSB India recently organized a seminar titled "Financial Empowerment - Navigating the Path to Prosperity" at the University Grants Commission (UGC) office.

Led by **Anshul Srivastava, CFP®- Head of Standards & Certifications at FPSB India**, the event focused on equipping UGC staff with essential skills in financial planning, budgeting, and risk management.

We extend our gratitude to all UGC participants, both in person and virtually, for their active engagement. Stay tuned for updates on our upcoming events and remember, financial empowerment is about taking comprehensive control of your finances.



FPSB India Welcomes The WallStreet School as Authorized Education Provider in New Delhi

We are delighted to announce our latest collaboration with The WallStreet School (TWSS) as an authorized education provider for **CERTIFIED FINANCIAL PLANNER®** education.

This partnership, endorsed by **Manoj Goel, Co-Founder & Director**, and **Shilpi Jain, Managing Partner** at The Wallstreet School, marks a significant step in advancing financial education in India.

Together, we aim to make a profound impact on the future of financial planning education.



CFP® Certification Program : Initiatives and Developments

FPSB India Explores Collaboration with the Institute of Chartered Accountants of India (ICAI)

FPSB India Team recently held a productive meeting with The Institute of Chartered Accountants (ICAI) Vice President CA Charanjot Singh Nanda and CA Umesh Sharma, Central Council Member, at ICAI Bhavan in New Delhi.

The discussions centered on potential collaborative efforts to enhance financial education and professional development.



Financial Planning Session at Sheshadripuram College in Bengaluru

FPSB India's Rajesh Singh, Sr. Manager-Business Development, in collaboration with Arjun Varadaraj, Founder of ArivuPro, recently delivered an insightful session at Sheshadripuram College, Bengaluru.

Targeting UG and PG students (BCom, MBA), the session emphasized the importance of financial planning, the role of CFP® professionals, and the benefits of choosing a career in financial planning.

We thank all students for their enthusiastic participation.

FPSB India Explores Synergies with the Institute of Management Accountants (IMA)

In a recent meeting, the FPSB India team had the privilege of discussing future collaborations and synergies with Mr. Sunil Deshmukh, the Global Chair Elect of the Institute of Management Accountants (IMA).

The dialogue centered on how combined efforts could positively impact the financial fraternity at large. Mr. Deshmukh's insights and experiences were invaluable, shedding light on potential avenues for growth and development.



FPSB India Engages with QS I M-Gauge: A Strategic Dialogue

FPSB India recently convened with Ravin Nair, Chief Operating Officer at QS I M-Gauge, marking a significant step towards strategic collaboration.

Deliberations revolved around leveraging each other's strengths to advance the standards of financial literacy and professional development.



She Plans, She Leads, We Prosper!

The Role of Financial Independence for Women in New Bharat

Opportunity to earn 1 CPD point for CFP® Professionals via LMS portal!



Speaker

Speaker

Host



PRABLEEN BAJPAI, CFP®
Founder of FinFix® Research and Analytics Pvt. Ltd.



SWATI KUMARI
B Wealthy | Zee Business | Star India | CNBC Awaaz



HIMANI SHARMA
Manager - Partner Success & Strategy @ FPSB India

Exciting Job Opportunities: Explore Now & Apply Soon!

1. AUM Capital (Full Time)

For CFP Professionals

- Position: Wealth Manager
- Location: Ahmedabad / Baroda / Chennai / Jaipur / Indore / Kolkata / Pune / Delhi
- No. of Opening: 15
- More Details: [Click Here!](#)

For Freshers

- Position: Wealth Manager
- Location: Mumbai / Delhi / Bangalore / Chennai / Pune
- No. of Opening: 30
- More Details: [Click Here!](#)

2. Choice (Full Time)

For CFP Professionals

- Position: Wealth Manager
- Location: Ahmedabad / Baroda / Chennai / Jaipur / Indore / Kolkata / Pune / Delhi
- No. of Opening: 3-5 people each location
- More Details: [Click Here!](#)

3. ScripBox (Full Time)

For Freshers

- Position: Associate RM
- Location: Bangalore
- More Details: [Click Here!](#)

4. Moneyfrog Financial Service Pvt. Ltd. (Full Time)

For Freshers

- Position: Financial Planner
- Location: Mumbai
- No. of Opening: 3
- More Details: [Click Here!](#)

5. GEPL CAPITAL PRIVATE LIMITED (Full Time)

For CFP Professionals

- Position: Fundamental Research Analysts
- More Details:

6. Care Portfolio Managers Pvt. Ltd (Full Time)

For CFP Professionals

- Position: Business Development & Relationship Manager
- Location: Mumbai
- More Details: [Click Here!](#)

KNOW MORE



JOBS

Calling all MBA Students Summer Internship Opportunity!



INTERNSHIP PROGRAM

Dive into the world of financial planning with FPSB India's exclusive 60-90 day summer internship!

Gain firsthand experience in frontline financial activities, tackle real-world challenges, and expand your network alongside seasoned professionals.

- 📍 Location: Ahmedabad/Gandhinagar
- 🕒 Duration: 60-90 days
- 🎯 Ideal Candidate:
 - Passionate MBA students with a flair for finance
 - Strong analytical and communication skills
 - Thrives in a dynamic, collaborative environment

Don't miss this chance kickstart your career in financial planning! Send your resume to Himani Sharma at hsharma@fpsb.in to apply. Seize the opportunity now!



Invites CFP® Professionals and Students to a

BOOTCAMP For Setting Up Your Own Financial Planning Practice!

- 📍 Auditorium, IIM Bangalore
- 📅 Friday July 5th, 2024
- 🕒 09:00 AM to 06:00 PM

REGISTER FOR FREE*
LIMITED SEATS AVAILABLE



REGISTER NOW

Follow us on our LinkedIn Channel for latest updates!

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 Insurance Institute of India

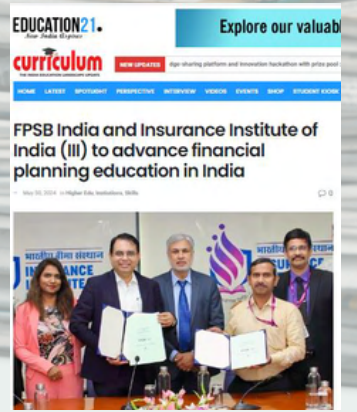
The Hindu



Career India



BWC CFO World



Financial Planning for Soon-to-Be Moms

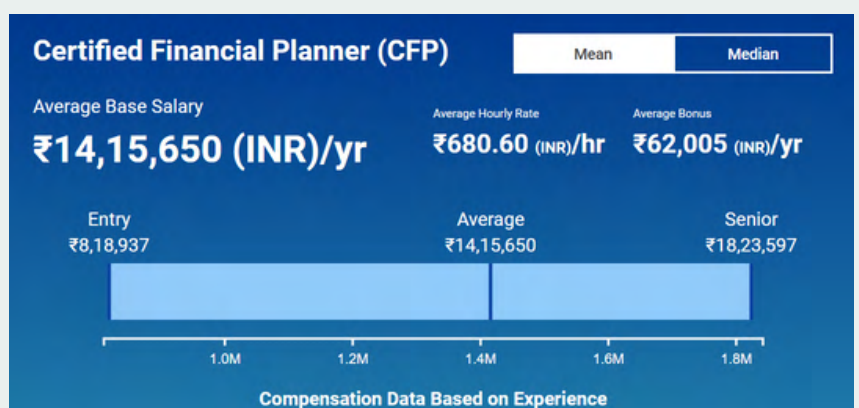
It is crucial for expecting mothers to secure their financial future. Planning for maternity breaks with a sound financial strategy ensures stability and peace of mind.

Learn essential tips to build a robust financial plan from Krishan Mishra, CEO of FPSB India, as featured in The Economic Times.



CFP® Professional's Latest Salary Insights in India

According to **ERI's Salary Expert Database**, the average CERTIFIED FINANCIAL PLANNER® (CFP) in India earns a gross salary of ₹14,15,650 annually, with an additional average bonus of ₹62,005. Entry-level CFP professionals (1-3 years experience) earn around ₹8,18,937, while senior CFP Professionals (8+ years experience) can earn up to ₹18,23,597.



Salary Expert: Powered by ERI



News ABP Live



Other Interesting Articles



UGC Introduces Life Skills Curriculum Aligned With National Education Policy 2020



19% annual returns in 10 years on buying gold on Akshaya Tritiya



Gold prices fluctuate ahead of Akshaya Tritiya: What investors need to know

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 a Mutual Fund Distributor and a proud CFP® Professional. This certification added value to my journey as a financial planner. It has given me another feather in the cap which has further boosted my skills as a financial planner. The elements of the course are quite relevant with in-depth focus on all aspects of financial planning for people of all age group and income group. The various FPSB India events and knowledge sharing sessions provide a good platform to keep myself updated and involved in the financial realm. I always try to be a part of the events that happen across the country and I am very excited and proud to be a part of the CFP professional community"

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Inder Pal Singh CFP®
Founder, MaxWealth Investments



"Before becoming a CFP® professional, I transitioned from an engineering career to financial planning, starting as an insurance advisor and expanding to mutual funds, fixed deposits, and bonds. Realizing a gap in my ability to provide comprehensive guidance, I pursued the CFP® certification. Its curriculum was instrumental in broadening my understanding of complex financial concepts in portfolio building. Upon achieving the certification, I experienced a newfound confidence in addressing investor inquiries, which significantly enhanced my ability to serve over 1000 satisfied families. I wholeheartedly recommend the CFP certification to anyone seeking to excel in the financial field and make a lasting impact."

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Sucheta Bhirud CFP®
Certified Financial Planner
Classic Investments



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