



CFP® Professionals CONNECT

NEWSLETTER

VOLUME 11 - JULY 2024 EDITION

Message from the CEO

Dear CFP® Professionals family,

As we step into the vibrant month of July, I want to take a moment to reflect on the incredible progress we have made together so far this year. The past few months have been a celebration of innovation, collaboration, and growth. I am immensely proud of the dedication and resilience shown by each of you in our CFP Professional family.



Innovation remains at the heart of our mission. This year, we've launched several groundbreaking projects that are already making waves in the industry. Our commitment to staying ahead of the curve is evident in the way we continuously adapt and evolve. Your creativity and willingness to explore new ideas fuel our success.

Our achievements are a testament to the power of teamwork. Across geographies, we have seen unprecedented levels of collaboration. The synergies created through our collective efforts are truly inspiring. I encourage you to continue fostering these connections, as they are key to our sustained growth and success.

June marked several significant milestones for our organization. We formed new partnerships, such as with Mirae Assets Global Investment Managers, our newly authorized corporate partner. With Mirae Assets, we will work on new career opportunities and upskilling through our certification. We also conducted a session with AIMA to share the importance of financial planning and our certification. Each milestone is a reminder of our shared vision and the hard work that turns that vision into reality. Let's take pride in these achievements and use them as motivation to reach even greater heights.

Our recent Bootcamp at the IIM Bengaluru campus on July 5th was a fantastic event, with over 300 attendees. This event provided valuable insights into setting up a CFP® practice. We have a robust pipeline of exciting events and initiatives that promise to propel us further. While challenges are inevitable, I am confident that with our collective spirit and determination, we will not only meet but exceed our goals.

On a personal note, I want to express my gratitude for the support and trust you place in the financial planning profession. It is an honor to be part of this wonderful family. Your feedback and insights are invaluable, and I encourage you to continue sharing them. Together, we are building a future we can all be proud of.

Thank you for your unwavering dedication and hard work. Here's to a successful and rewarding month ahead!

--Krishan Mishra

CFP® Certification Program: Latest Updates

FPSB India Welcomes Mirae Asset as First Approved Corporate Partner



FPSB India proudly announces our first Approved Corporate Partner, Mirae Asset Global Investment Managers and its subsidiaries in the presence of **Swarup Mohanty Vice Chairman and CEO of Mirae Assets.**

This significant partnership aims to enhance the skills of Mirae Assets employees through specialized training programs and provide access to a talented pool of CFP professionals.

Additionally, we will engage in mutual advocacy efforts to promote the value of financial planning.

FPSB India Partners with RV University to Offer CFP® Certification Program

FPSB India and RV University have signed a landmark MoU to promote financial planning education by offering the CFP certification program to both postgraduate and undergraduate students.

This collaboration aims to equip students with globally recognized financial planning credentials, enhancing their career prospects in the financial services industry.

The signing ceremony was graced by **Dr. Y.S.R. Murthy, the Founding Vice Chancellor of RV University, Bengaluru**, marking another step forward in the education and professional development of future financial planners.



Krishan Mishra Speaks on CFP® Certification Program and FPSB India's Future at Insightful Minds



MyLogic Business Management School, FPSB India's Authorized Education Partner, recently featured Krishan Mishra in their professional leadership talk series, Insightful Minds.

Vinod Chandran CEO MyLogic engaged Mr. Mishra with questions about the career prospects and scope of CFP certification in India, as well as the future plans of FPSB India.

Don't miss Mr. Mishra's candid insights.



CFP® Certification Program : Initiatives and Developments

FPSB India and AIMA Host Engaging Panel on the Role of CFP® Professionals

FPSB India recently partnered with All India Management Association (AIMA) for a dynamic panel discussion **highlighting the critical role of CFP professionals in organizations**. The session, moderated by Pankaj Dhingra Founder Fintram Global, featured insights from Krishan Mishra and Dr. Rohit Singh Director AIMA.

The event received excellent feedback for its informative and engaging discussions on enhancing financial planning expertise in the industry.



FPSB India Awards ICOFP with Premium Education Provider Certificate

FPSB India proudly awarded the certificate of **Premium Education Provider to International College of Financial Planning (ICOFP)** in a ceremony attended by Krishan Mishra and Team at their premises in New Delhi.

This recognition underscores ICOFP's commitment to excellence in financial planning education as FPSB India's Authorised Education Provider.

FPSB India Explores Collaborative Opportunities with Bajaj Capital Leadership

IFPSB India Team recently engaged in a fruitful discussion with **Sanjiv Bajaj, Joint Chairman and MD of Bajaj Capital, and Vani Bajaj, who leads ICOFP**.

The discussions were fruitful, focusing on exploring various avenues for a prospective collaboration. Furthermore, exciting opportunities were identified to enhance financial education and professional development in the industry.



FPSB India Celebrates Achievement at BSE India with AEP Nextlevel

FPSB India's Authorized Education Partner, Nextlevel, hosted a prestigious event at BSE India where **Teena Rawal, Head of Strategic Alliances at FPSB India**, awarded certificates to approximately 40 CFP professionals from across the country.

The event drew an audience of over 250 MFDs and CFP professionals, highlighting a significant milestone in recognizing and celebrating excellence in financial planning education.

EPISODE 3

FROM POCKETS TO PORTFOLIOS

CEOs' Personal Money Management Journeys!

GUEST

Apurva Sahijwani

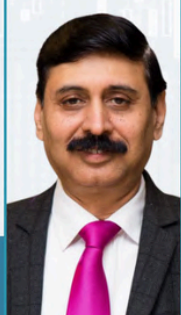
MD & CEO of Aventus Wealth Management



HOST

Arun Thukral, CFP®

CPAC Chairman - FPSB India



Watch the 3rd Episode of
'From Pocket to Portfolio' Series!

Featuring Special Guest :
Apurva Sahijwani MD & CEO
Aventus Wealth Management

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



AVAILABLE
NOW

Journal of Financial Planning in India : June 2024 Edition

Explore the June 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



FPSB India Represents at the APAC Conference in Bali

A heartfelt thanks to FPSB Indonesia for hosting the
APAC Conference in Bali, where leaders from 12
territories across the Asia-Pacific region convened to
discuss opportunities, best practices, trends, and
shared interests in advancing the global financial
planning profession and CFP® certification.

With the Asia-Pacific region representing 38.2% of CFP
professionals worldwide, this growth underscores the
significant value of CFP certification in this area.

We deeply appreciate FPSB Indonesia and our entire
network of organizations in the Asia-Pacific for their
dedication to CFP certification, the global symbol of
excellence in financial planning.

Krishan Mishra, our CEO, represented us
at this important event and shared his thoughts and
ideas for the growth of CFP® Program in India



BOOTCAMP

For Setting Up Your Own
Financial Planning Practice!

Gratitude to All Attendees of the Boot Camp!

On behalf of the entire organizing committee of FPSB India, we extend our heartfelt gratitude to each and every one of you who participated in our Boot Camp for Financial Planning Professionals at IIM Bangalore on July 5, 2024. Your presence and engagement were instrumental in making this event a resounding success.

We extend special appreciation to the team at IIM Bangalore and Center for Capital Market and Risk Management (CCMRM) for their collaboration. Your support and efforts were crucial in bringing together this remarkable event, which witnessed an impressive turnout of over 300 attendees. This collaboration has set a high standard for future events, and we are deeply grateful for your partnership. Special thanks to Krishan Mishra CEO FPSB India, Prof Rishikesh T Krishnan Director IIM Bangalore, Prof M Jayadev Dean IIMB & Chairperson CCMRM-IIMB, Prof Jacob Joshy, IIM Ahmedabad (from left to right) for their enthusiastic approach and unwavering support in ensuring the seamless execution of this event.

Thank you once again for being a part of this incredible journey. Together, we are shaping the future of financial planning in India!



Technical Session 1

PART I: Entrepreneurship



Deepak Jain
Founder, FinAtoZ

PART II: Strategy



Karan Batra
COO, Fisdome



Panel Discussion 1: From Prospects to Clients: The Path to Your First 25 Clients and Beyond



From Left to Right : Karthick CS, Co- Founder Knowise Learning Academy, Dilshad Billimoria Founder & MD Dilzer Consultants Pvt Ltd, Arun Thukral CPAC Chairman FPSB India, B Srinivasan Director Shree Sidvin Financial Services & Investments Pvt. Ltd and Yuva Raja MD BOHO Finserv Pvt.Ltd

Technical Session 2

PART I: Investor Psychology

PART II: Marketing Your CFP Venture



Dr Prasanna Chandra
Director, Center for Financial Management



Robin Bhowmik
CBO, Manipal Academy of BFSI

Panel Discussion 2: From Vision to Reality- Strategies for Establishing a Successful Financial Planning Practise



From Left to Right : Uday Dhoot Partner- VennWealth, Prof G Sabarinathan IIMB, Suresh Sadagopan MD & Principal Officer Ladder7 Wealth Planners, A Suresh Paralegal Consultant Estate Planner- PropSeva and Prof Nitin Vishen IIMB.

Technical Session 3 : AI and Future of Banking



Mathew Joseph
Director & Head
CIMB Bank Artificial
Intelligence Labs



Panel Discussion 3: Risk Management and Contingency planning of your Business



From Left to Right : Amit Gupta Founder The Reppro, Swati Kumari BWealthy Channel- Youtuber, Biju Punnachalil Chief Risk Officer South Indian Bank, Teena Rawal Head of Strategic Alliances FPSB India and Amisha Sethi VP Global Marketing Inflect



Event Report : To Be Released Soon!

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 Organised a Financial Planning Boot Camp with IIM Bangalore



BW Business World



Education World



Career India

Father's Day: 5 Reasons Why A Financial Plan is the Best Gift-- by Krishan Mishra

Meaningful ways to show appreciation for our fathers. Beyond the usual gifts, here are five reasons why a comprehensive financial plan makes the perfect gift on a Father's Day



Essential Reading for CFP Professionals



How to become a Certified Financial Planner along with a degree from open university - *The Indian Express*



Opportunities for CFP professionals in India to provide financial planning to global investors - *Financial Express*

PODCAST: Hear Krishan Mishra speak on THE CORE REPORT with Govindraj Ethiraj



In Episode 327 of The Core Report, financial journalist Govindraj Ethiraj engages Krishan Mishra, CEO of the Financial Planning Standards Board, discussing topics ranging from market trends and savings levels to fintech transparency and environmental impacts on India's economy.



Other Interesting Articles



Financial advice need of the hour, regulations crucial, says expert- *The Indian Express*



Experts rue lack of financial conversations at dinner table- *The Times of India*



Groww user alleges 'fraud', says app shows mutual fund investment but can't redeem, company denies; what are lessons for MF investors? - *ET Wealth*



RBI Kept Repo Rate Unchanged: What Does This Mean For Home Loan Borrowers? - *Good Returns*

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

“CFP® Certification has been at the epicenter of my professional growth. The comprehensive curriculum of the course has not only been the catalyst for my professional growth, but also helped me to gain deep insights in the intricacies of my personal finance management. Being a global level certification, this certification has helped me earn a place amongst the global financial planners’ community.

For all the aspiring financial planners and wealth advisors, CFP® certification program is that go-to and highly recommended certification for making a promising career”

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Anish Buche CFP®

Founder & Analyst, AVB Investments
Adjunct Faculty (Finance), SIBM Nagpur



“Before obtaining my CFP® certification, I wasn't in the financial sector at all. I was exploring different career paths but hadn't found my niche. The CFP® program guided me into the finance and wealth management field.

Today, I run my own practice, offering bespoke financial advice, from Indian markets to offshore investments. The certification not only provided the knowledge and skills I needed but also allowed me to help individuals and families achieve their financial goals.

For those considering the CFP® certification, it's a gateway to making a meaningful impact.”

—————→
Lakshay Gupta CFP®

Founder, Stealth Wealth



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