

CFP®Professionals CONNECT

NEWSLETTER

VOLUME 19 - MARCH 2025 EDITION

Message from the CEO

Dear CFP® Professionals Family,

As we step into March, I want to take a moment to reflect on our collective journey and the opportunities that lie ahead. The first quarter of the year has been filled with significant milestones, and I am proud of the dedication and resilience each of the FPSB India team members and CFP Professionals have demonstrated.

India has recorded an impressive 17.7% year-on-year growth - one of the highest in the world – taking the number of CFP® professionals in India to 3,215 in 2024, from 2731 in 2023.



Atotal of 230,648 CFP® professionals are now practicing in 28 territories globally assisting millions in developing comprehensive financial plans to navigate financial challenges, achieve their long-term financial goals and dreams of a secured financial future. This is because of your commitment, dedication and hard work for our noble profession.

We have continued to strengthen our commitment to excellence, innovation, and growth. We signed the following MOU's during the month of Feb-

- NMIMS, Bangalore
- · Apeejay School of Management
- Finnovate Pvt Ltd.

March is a crucial month as we lay the foundation for the rest of the year. Our focus remains on delivering value to our clients, fostering collaboration, and driving sustainable growth.

We are looking forward to hosting you at FPSB India Summit 2.0 along with our Global CEO, Dante De Gori CFP®. This would be a highly promising event for us as we will be listening to the top academia and industry leaders. The event is scheduled on April 07, 2025. You all are requested to register for the event in case not registered already.

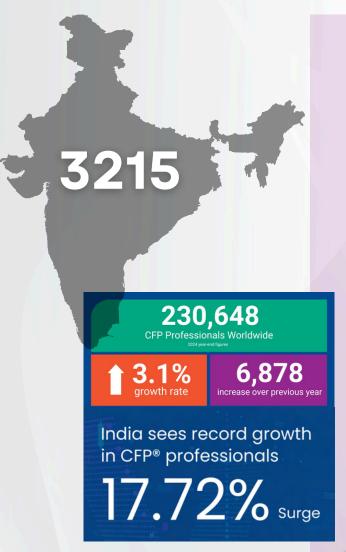
Let's extend a warm welcome to Bhavya Mahendra, Manager – Business Development, who has joined us in Hyderabad, and Sivakumar, Manager – Creative Designer in Bengaluru. With their expertise, we are confident of achieving new milestones and scaling new heights together!

I want to express my heartfelt gratitude to each of you. Your commitment, creativity, and teamwork is what makes FPSB India stronger. Let's continue to support one another, stay focused on our goals, and embrace the challenges that come our way with confidence. I am confident that we will achieve new heights together.

Wishing you all a productive and successful March and April ahead.

2024 CFP® PROFESSIONALS CFP® GROWTH NUMBERS





India's Growth Story: Surpassing 3,000 CFP® Professionals!

As on December 2024, Financial Planning Standards Board Ltd. (FPSB) is pleased to announce the number of CFP professionals worldwide has grown by 3.1%, with 230,648 CFP professionals now practicing across 28 territories.

India has emerged as one of the fastest-growing markets, recording an impressive 17.7% year-on-year growth—one of the highest globally. The number of CFP professionals in India has increased from 2,731 in 2023 to 3,215 in 2024, surpassing the 3,000 milestone.

As the licensing body for CFP® certification in India, FPSB India proudly acknowledges the unwavering dedication of CFP professionals in driving this growth and reinforcing the nation's commitment to professional financial planning.

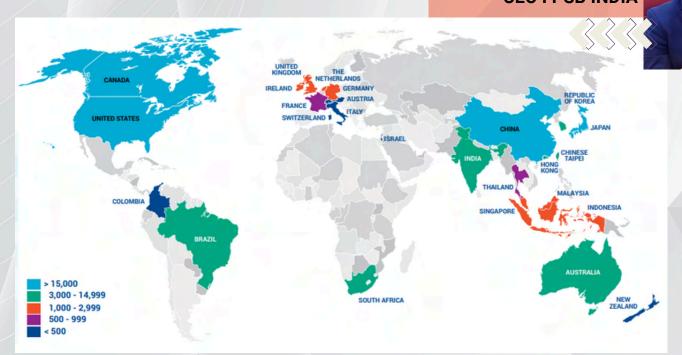


Four territories saw double-digit growth rates in their number of CFP® professionals:
Thailand (18.5%), India (17.7%),
Brazil (13.4%) and Switzerland (12.2%).



<u>"India stands as </u> one of the fastest-growing markets for CFP professionals, driven by a demand for CERTIFIED **FINANCIAL** growing PLANNER® professionals in financial planning **FPSB** India has experienced impressive 17.7% growth rate, signaling paradigm shift where financial planning is increasingly becoming a preferred career path for students, working professionals, and independent practitioners. As India's economy continues its upward trajectory, the need for Professionals who can offer comprehensive, holistic financial advice has never been more critical. I am also excited to share that there has been a steady increase in the number of CFP® professionals who are women. Currently, women 23% of the total 3,215 professionals in India, intending to reach 35% by 2030."

KRISHAN MISHRA
CEO FPSB INDIA



CFP® Certification Program: Initiatives and Developments

FPSB India Signs MoU with NMIMS Bangalore to Advance Financial Planning Education

FPSB India and SVKM's Narsee Monjee Institute of Management Studies (NMIMS) Bangalore have signed an MoU to strengthen financial planning education and promote CFP® certification in India.

The agreement was formally signed by **Dr. Narayani Ramachandran, Director, NMIMS Bengaluru Campus, and Krishan Mishra, CEO, FPSB India**, in the presence of Amisha Sethi, Sr. VP – Policy & Communications, Teena Rawal, Head of Strategic Alliances and Anurag Nigam, Zonal Head - Business Development from FPSB India.

The occasion was also graced with the presence other distinguished professionals and notable dignitaries from the financial planning community and the institution.







FPSB India signs an MoU with Apeejay School of Management to Empower Future Financial Planners

FPSB India has signed an MoU with Apeejay School of Management to offer CFP® certification as an elective for students, integrating globally recognized financial planning education into their curriculum.

The agreement was formally signed by **Dr. Rahul Singh, Director, Apeejay School of Management, and Krishan Mishra, CEO, FPSB India,** in the presence of Teena Rawal, Head of Strategic Alliances; Anurag Nigam, Zonal Head – Business Development; and Rajesh Singh, Sr. Manager – Business Development (North) from FPSB India.

The occasion was also graced by notable dignitaries from the management institution, further reinforcing the commitment to advancing financial planning education.

FPSB India Signs MoU with FINNOVATE PVT. LTD. as an Authorized Corporate Partner

FPSB India has signed an MoU with FINNOVATE PVT. LTD., onboarding them as an Authorized Corporate Partner under the ACP program.

The agreement was formally signed by **Krishan Mishra, CEO, FPSB India, and Nehal Mota, Director, FINNOVATE PVT. LTD.,** following a productive discussion with Teena Rawal, Head of Strategic Alliances, and Lushika Sahu, Sr. Manager- Partner Success & Business Strategy.

Through this collaboration, FPSB India will support FINNOVATE in talent acquisition, employee upskilling, and advancing shared goals in financial planning. Discussions are also underway for a potential association with their education wing for the AEP program.









FPSB India Engages with Atlas Skill-Tech University to Explore Collaboration

Krishan Mishra, CEO, FPSB India; Teena Rawal, Head of Strategic Alliances; and Lushika Sahu, Sr. Manager – Partner Success & Business Strategy, recently visited Atlas Skill-Tech University, Mumbai, for a discussion with **Dr. Indu Sahani, Chancellor at Atlas Skill-Tech University.**

They explored opportunities to enhance finance education and integrate financial planning insights into the curriculum. Krishan shared valuable perspectives on FPSB India's initiatives, and the team had the privilege of interacting with bright young minds while touring the campus.

FPSB India Engages in Strategic Discussions with VG Learning

Krishan Mishra, CEO, FPSB India; Anurag Nigam, Zonal Head – Business Development; and Rajesh Singh, Sr. Manager – Business Development (North), had an insightful meeting with **Vinod Gupta, Founder & Director of VG Learning Destination India**, one of the Authorised Education Provider's of FPSB India.

They discussed plans for the financial year and FPSB India's involvement in key activities for the coming months.



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FPSB India Explores Collaboration with Christ University



Krishan Mishra, CEO, FPSB India, met Fr. Viju P.V., Pro Vice Chancellor, Christ University, for a meaningful discussion on potential collaborations, including an integrated program and other academic engagements.

Teena Rawal, Head of Strategic Alliances, and Anurag Nigam, Zonal Head – Business Development, also joined the conversation, strengthening ties with the institution.

Welcome Bhavya Mahendra & Siva to the FPSB India Team!

We are delighted to welcome Bhavya Mahendra as Manager – Business Development, Hyderabad. With over a decade of experience spanning banking, the development sector, management consulting, social entrepreneurship, and corporate partnerships, Bhavya brings invaluable expertise to our team. Beyond her professional journey, she is passionate about traveling, networking, storytelling, and dancing—bringing creativity and energy to everything she does!

We also extend a warm welcome to Siva, who joins us as Manager – Creative Designer. A passionate designer with over eight years of experience at companies like Amazon, Infilect Inc., iOPEX Technologies, and 2adpro Media Solutions, Siva has a keen eye for transforming ideas into visuals. Outside of work, he enjoys playing cricket, watching Tamil movies, and expressing himself through painting. A man of few words but boundless creativity, Siva is sure to bring fresh perspectives to the team!



BHAVYA MAHENDRA



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







FPSB India Participates in CEO Conclave 2025 at K J Somaiya Institute of Management

FPSB India actively participated in CEO Conclave 2025 at K J Somaiya Institute of Management, where Krishan Mishra, CEO, FPSB India, joined a distinguished panel featuring Sanjay Guha, Founder & CEO, Acquist Marketing & Information Solutions Pvt. Ltd.; Ashok Gautam, MD & CEO, India International Bullion Exchange IFSC Ltd. (IIBX); and Dr. Rajan Venkatesh, MD & CEO, Laxmi Organic Industries Ltd. The discussion, moderated by Arun Thukral, Professor of Practice - Finance & Law, K J Somaiya Institute of Management, focused on "Meeting Deadlines Without Missing Life."

Krishan was accompanied by Alok Kumar, Head of Certification & Engagement; Teena Rawal, Head Strategic Alliances; and Lushika Sahu, Sr. Manager -Partner Success & Business Strategy at FPSB India.

FPSB India also served as the jury for the Stratagem Case Study Competition on financial planning, which witnessed participation from 254 business schools nationwide.







Strengthening Financial Planning Education with NMIMS Bengaluru

Following the MoU signing with NMIMS Bengaluru, a panel discussion on "Pocket Money to First Paycheck" provided valuable insights for Gen Z on early financial planning. Moderated by Dr. Shreya Chakraborty, Professor, NMIMS Bengaluru, the discussion featured Amisha Sethi, Senior VP, Policy



& Communication, FPSB India; Teena Rawal, Head Strategic Alliances, FPSB India; Gazal Harlalka, CFP® Professional & Investment Counsellor - South, Motilal Oswal Wealth; and B. Srinivasan, CFP® Professional.

The panelists shared diverse perspectives on transitioning from pocket money to paychecks, key financial considerations during this phase, and the importance of financial planning, informed decision-making, and long-term financial security.



FPSB India and NISM Host Webinar on Smart Financial Planning and Career Perspectives

FPSB India, in collaboration with NISM, hosted a webinar on "Smart Financial Planning and Career Perspectives." Krishan Mishra, CEO, FPSB India, highlighted the crucial role of financial planners and career opportunities in the field. The session was moderated by Teena Rawal, Head -Strategic Alliances, FPSB India.

For those who missed the live session, the webinar is available for viewing online. You can watch it here:



The Power of Financial Planning: Insights from FPSB India at EDII, Ahmedabad

FPSB India participated in an engaging and insightful event at the prestigious Entrepreneurship Development Institute of India, Ahmedabad. Krishan Mishra, CEO of FPSB India, delivered a compelling speech on the highly relevant topic: "The Importance of Financial Planning Education in Management and Entrepreneurship Programs in India."



He emphasized the crucial role that financial planning

education plays in shaping successful businesses and effective management strategies, particularly in the growing Indian economy. He discussed how incorporating financial planning education into entrepreneurship and management programs is essential to foster informed decision-making, sustainable growth, and risk mitigation for future leaders.

Moreover, he highlighted the significance of the CFP® certification as a powerful credential for financial professionals in India, underscoring its global recognition and the expertise it brings to the financial planning field.



LAST CALL! FPSB INDIA SUMMIT 2.0



"EMPOWERING THE NEW BHARAT
THROUGH FINANCIAL EDUCATION AS
THE KEY TO ENTREPRENEURSHIP &
EMPLOYABILITY"

mmn famm

tomorrow

7TH APRIL, 2025

KJ Somaiya Institute of Management Mumbai FPSB India Summit 2.0 close on March 25th!





@GlobalMonevWeek #GMW2025

17-23 March 2025Think before you follow, wise money tomorrow



FPSB India is proud to be a part of this global annual financial awareness campaign, focusing on equipping young people with the knowledge, skills, and attitudes needed for sound financial decision-making.

NOW STREAMING ON YOUTUBE

FIRESIDE CHAT

Money Matters: A Practical Guide to Budgeting, Saving, and Growing for Students

Importance of Financial Planning

Stay tuned to our LinkedIn channel for more exciting updates!



KRISHAN MISHRA
CEO FPSB India



AMISHA SETHI
Senior VP - Policy & Communications
FPSB India

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.

CFP Certification Growth in India





Hans India Big Buzz



Free Press Journal



Shiksha.com



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India Becomes Fastest-Growing Hub For Certified Financial Planners Professionals, Sees 18% Rise

CFPs are experts who play a key role in helping individuals plan their finances, manage wealth, and achieve longterm financial stability.

As per FPS8 India, the number of CFP professionals grew by 3.1 per cent last year globally, with a total of 230,648 professionals now working across the country. Women are also making strides in the CFP profession.

Not So Rosy Valentine At Dalai Street, As Sensex & Nifty Close Another Day In Red

Currently, 23 per cent of India's 3,215 CFP professionals are women, and FPS8 India aims to increase this number to 35 per cent by 2030.

"India stands as one of the fastest-growing markets for CFP professionals, driven by a growing demand for Certified Financial Planner Professionals in financial planning services," said Krishan Mishra, CEO, FPSB India,



How Upskilling Empowers Women to Financially Future-Proof Their Careers- Article Authored by Krishan Mishra

An insightful article by Krishan Mishra, featured in SheThePeople, explores the growing demand for skilled financial professionals and the value of CFP® certification for women.

He highlights how upskilling in financial planning not only enhances career prospects but also empowers women to take charge of their financial future. Read more about why financial planning is a lucrative career choice for women.





SIMSREE Course Launch

Education Times



News Patrolling



Careers 360



Shiksha.com





For Course Information









Other Interesting Articles

Articles featuring the latest CFP® certification numbers and key insights about the CFP® certification has been published. -- New Indian Express (EdexLive)



Explained: How your mutual fund investments will be taxed in financial year 2025

-- Economic Times



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.





"Investments are just one part of financial planning—CFP® certification also covers risk management, estate planning, and more. Pursuing the CFP® program during my graduation was one of my best decisions. With its flexible exam structure, I completed it within a year, even before graduating! It not only shaped my personal finances but also enabled me to manage wealth for countless families.

The global recognition from FPSB India elevated my professional standing, unlocking new opportunities. It fueled both my personal and professional growth, taking me from a financial planner to a trainer and eventually to leading the CFP certification vertical at FPA Edutech.

And the best part? Empowering students and professionals to build impactful careers using comprehensive financial planning concepts. With the rising demand for financial expertise, CFP® professionals are now highly sought after across industries. I highly recommend it to anyone looking to build a successful career in finance!"

Yukti Gada CFP®

Vice President FPA Edutech "The CFP® certification significantly enhanced my career by boosting my credibility, expanding my expertise, and opening new opportunities.

The rigorous program deepened my knowledge in financial planning, tax strategies, and investment management, allowing me to provide holistic advice. It strengthened client trust, leading to stronger relationships and increased referrals.

The certification also positioned me for career advancement as many firms value CFP® professionals. Beyond career growth, it improved my own financial decision-making.

Ultimately, the CFP certification as a designation gave me confidence, professional satisfaction, and the ability to make a meaningful impact on clients' financial wellbeing."

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