

MESSAGE FROM THE CEO

Dear CFP® Professionals,

As we step into the Financial Year 2025–26, it's a perfect moment to pause, reflect, and realign our vision, not only for our personal and professional goals but also for the collective mission of elevating the financial planning profession in India and aiming collectively towards the Viksit Bharat 2047 Mission run by the Govt. of India. The beginning of a new financial year brings fresh opportunities and renewed energy to build a financially secure future for the individuals and communities we serve.

March 2025 has been a remarkable month for us at FPSB India. As part of the Global Money Week 2025 (GMW) celebrations, we launched a series of meaningful initiatives centered on this year's theme, "Think before you follow, wise money tomorrow." With a strong emphasis on encouraging critical thinking in financial decision-making, our efforts aimed to equip the youth with the tools needed to navigate the complex world of digital finance. Our participation at NMIMS Bengaluru stood out, where over 300 enthusiastic students engaged deeply with the message of financial literacy. My recent podcast, "Money Matters: Budgeting, Saving & Growing Tips for Students," offered practical insights on financial behavior and how to make informed choices. Additionally, a vibrant digital poster-making competition at NMIMS Bengaluru showcased the creative perspectives of students on what financial freedom truly means.

One of the highlights of this GMW 2025 campaign was our special Hindi podcast, which explored the evolving landscape of rural financial

planning in India. The insightful conversation between Shiv Raj Singh, CFP®, Designated Partner at Fintellect Intelligent Financial Services & IMF LLP, and myself shed light on the vital role CFP® professionals can play in fostering financial inclusion, especially in areas where access and awareness still pose a challenge.

Another milestone was our participation as Knowledge Partner at Christ University's International Conference on AI & Industry 5.0. With our distinguished team sharing insights on how technology and financial planning intersect, it reinforced the relevance of our profession in the digital economy.

We also launched a brand video that beautifully captures the essence and impact of being a CFP® professional. If you haven't seen it yet, I highly encourage you to watch it—it is a powerful reminder of how our work transforms lives. This video, and the overwhelming response to it, makes us even more proud of what we do every day.

Additionally, the FPSB India Summit 2.0 marked a significant milestone, uniting leading academicians, industry experts, CFP® professionals, and thought leaders under the powerful theme, "Empowering the New Bharat through Financial Education as the Key to Entrepreneurship & Employability." The presence of Mr. Dante De Gori, CEO of FPSB Ltd., added immense value to the occasion, reinforcing our collective commitment to upholding global standards and fostering international collaboration.

We look forward to sharing a detailed recap of the Summit 2.0 and Dante's visit in our upcoming May edition—stay tuned for all the highlights!

As we look ahead, we are thrilled about the launch of the Executive Program in Financial Planning & Investment Advisory Services with CFP® Certification by IIM Ahmedabad, in partnership with FPSB India. This initiative marks a significant stride toward integrating world-class financial planning education into premier institutions and reflects our vision of supporting Viksit Bharat 2047 through structured and ethical financial advice.

To all our CFP® professionals, partners, educators, and students—thank you for being part of this transformative journey. Together, we are setting new benchmarks for professionalism, purpose, and impact in financial planning.

Here's to a new year filled with inspiration, integrity, and intentional financial choices.

Krishan Mishra.

Chief Executive Officer, FPSB India



Wishing You a Happy Financial Planning Year 2025–26!

As we step into the new financial year, it's the perfect time to realign our financial goals, review investments and insurances, and build a robust plan for the future. From budgeting and saving to retirement planning and portfolio diversification—let's make FY 2025–26 a year of smart financial choices.

Here's to a prosperous and well-planned year ahead!

KNOW MORE



IIM Ahmedabad Launches Executive Program in Financial Planning

IIM Ahmedabad Executive Program in Financial Planning & Investment Advisory Services, with CFP® certification by FPSB India. This pioneering collaboration highlights the rising importance of structured financial planning education in India, supporting the vision of Viksit Bharat.

This one-year program is poised to redefine the landscape of financial advisory services in India, setting new benchmarks in professionalism and expertise. Tailored for mid-to-senior finance professionals, the program covers investment, retirement, tax, insurance, estate planning, and more—setting new benchmarks in financial advisory education.

Admissions begin March 2025 LEARN MORE



Potential Collaboration with IIM Ranchi

Krishan Mishra, CEO, and Lushika Sahu, Sr. Manager – Partner Success & Strategy, had a productive visit to IIM Ranchi. During the visit, Mr. Mishra led an engaging session with the esteemed faculty, fostering insightful dialogue around financial planning education.

The team also met with Prof. Deepak Srivastava, Director of IIM Ranchi and Dr. Manish Bansal, Assistant Professor- IIM Ranchi, where discussions reflected a strong interest in potential collaboration. FPSB India looks forward to building a meaningful and impactful partnership in the near future.

Exploring Synergies with World Education Services (WES)

FPSB India had a fruitful discussion over lunch with Mandeep Singh, MD – India, and Siddhartha Chatterjee, Marketing Manager – India, from World Education Services (WES).

The meeting focused on exploring collaborative opportunities aimed at mutual growth and expanding the reach of quality financial education. The meeting was led by Krishan Mishra, CEO, and Anurag Nigam, National Manager– Business Development, FPSB India.



Exploring Collaboration with IIM Raipur

The FPSB India team had a productive visit to IIM Raipur, engaging in a meaningful discussion with the Asst. Professor, Prof. Pradiptarathi Panda, on integrating global financial planning standards into the institute's academic curriculum. The conversation focused on aligning the CFP®

certification with IIM Raipur's vision to enhance professional education in finance and investment advisory. The visit was led by Krishan Mishra, CEO, and Lushika Sahu, Sr. Manager – Partner Success & Strategy, FPSB India.



TEAM ENGAGEMENTS

FPSB INDIA

PARTICIPATED IN AN EVENT HOSTED BY FEDERATION OF FINANCIAL PLANNERS (FFP)



On March 8, the Federation of Financial Planners (FFP) organized a collaborative event with FPSB India in Hyderabad, bringing together CFP® professionals for a day of knowledge-sharing and celebration.

Mr. Krishan Mishra, CEO of FPSB India, delivered an inspiring address on the transformative role of financial education, while Lushika Sahu, Senior Manager – Partner Success & Strategy of FPSB India, delivered a powerful Women's Day speech highlighting the importance of empowerment and lifelong learning.

Bhavya Mahendra, Manager-Business Development (AP & Telangana), also contributed to the success of the event, which featured an AI-generated jingle and a special tribute to women in financial planning. Overall, it was a wonderful event with a lot of mutual synergies exchanged with our CFP professionals in Hyderabad.

KNOW MORE

FPSB INDIA

AT CHRIST UNIVERSITY'S
INTERNATIONAL CONFERENCE
ON AI & INDUSTRY 5.0



FPSB India marked a dynamic presence at the International Conference on New Paradigms in Economy, Commerce, and Society – Harnessing Artificial Intelligence and Industry 5.0 for a Sustainable Future, held on March 22, 2025, at Christ University, Delhi NCR. Organized in collaboration with the University of Louisiana Monroe (ULM), USA, the prestigious event featured FPSB India as the Knowledge Partner.



Mr. Krishan Mishra, CEO, FPSB India, delivered a thought-provoking address during the inaugural session, while Ms. Amisha Sethi, Sr. Vice President – Policy & Communications, shared valuable insights as part of a distinguished panel.



The event concluded with an inspiring speech by Ms. Lushika Sahu, Senior Manager – Partner Success & Strategy, during the valedictory session.

The conference served as a vital platform for fostering dialogue on the evolving role of AI and Industry 5.0 in shaping a sustainable economic and societal future.



KNOW MORE



HIGHLIGHTS OF THE MONTH



FPSB India Celebrates GLOBAL MONEY WEEK 2025

FPSB India is proud to be part of the Global Money Week 2025 campaign (March 17–23), a global initiative led by Financial Planning Standards Board Ltd. This annual financial awareness campaign focuses on equipping young people with the knowledge, skills, and mindset needed to make informed financial decisions and build a secure future.

1

Podcast with Krishan Mishra & Amisha Sethi : Fireside Chat-Money Matters: Budgeting, Saving & Growing Tips for Students



2

As part of its Global Money Week 2025 awareness initiatives, FPSB India participated in a vibrant and insightful event at SVKM’s Narsee Monjee Institute of Management Studies (NMIMS), Bengaluru, engaging over 300 students from various programs.

The event featured inspiring keynotes by Prof. Sangita Kher, Founding Dean, School of Commerce, and Dr. Narayani Ramachandran, Director, NMIMS Bengaluru, emphasizing the importance of financial literacy for young adults. Amisha Sethi, Sr. VP – Policy & Communication FPSB India, shared practical strategies through her session on “Mantras of Money Mindfulness,” helping students develop a healthier relationship with money. Anurag Nigam, National Manager- Business Development, FPSB India, delivered a powerful talk on understanding and simplifying financial behavior.

3

As part of the Global Money Week 2025 initiatives, FPSB India released a special Hindi podcast featuring Krishan Mishra, CEO, FPSB India, in conversation with Shiv Raj Singh CFP®, Designated Partner at Fintellect Intelligent Financial Services & IMF LLP, on the ‘Future of Rural Financial Planning in India’.

The discussion delves into the evolving landscape of rural financial planning in India, highlighting the unique financial needs of rural communities, challenges around accessibility and financial literacy, and the critical role of CFP® professionals in driving financial inclusion. The podcast also explores innovative approaches to empower rural populations through structured financial planning.

KNOW MORE

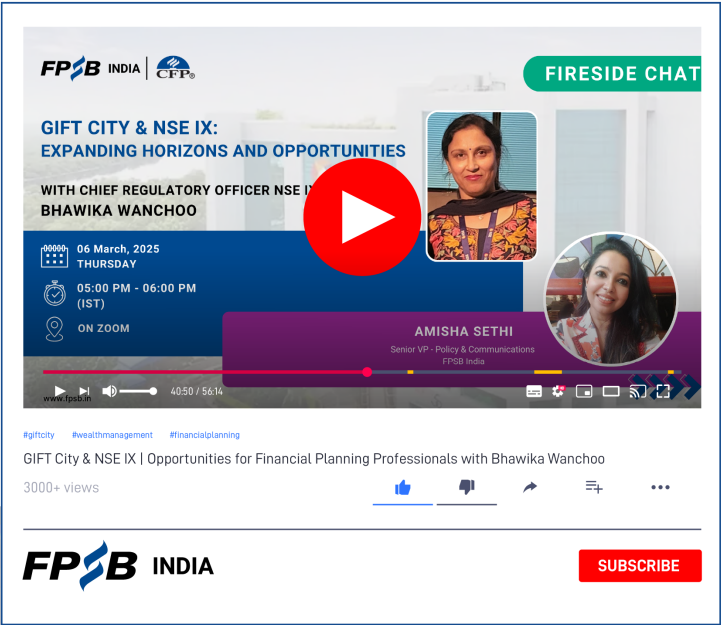
Missed it?
WATCH
HERE!



GIFT City & NSE IX: Expanding Horizons and Opportunities – Fireside Chat Webinar with Ms. Bhawika Wanchoo

Watch this exclusive fireside chat webinar tailored for CFP® professionals, featuring Ms. Bhawika Wanchoo, Chief Regulatory Officer at NSE IX, and hosted by Amisha Sethi, Senior VP – Policy & Communications at FPSB India.

As India’s financial ecosystem evolves, GIFT City and NSE IX are at the forefront of unlocking global investment opportunities. This session will provide a deep dive into the role of NSE IX within GIFT City, the latest financial products, and the regulatory landscape shaping international investments.



SPOTLIGHT NEWS!

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.

IIMA & FPSB India Executive Course Launch



Global Money Week 2025 Special

As part of the Global Money Week 2025 initiatives, Krishan Mishra, CEO of FPSB India, authored an insightful article titled “Pocket Change to Prosperity: How Small Savings Can Help Build a Big Corpus.” The piece highlights the power of developing smart saving habits early in life, emphasizing how even small portions of pocket money, when managed wisely, can grow into substantial investments over time—laying a strong foundation for financial independence and security.

KNOW MORE



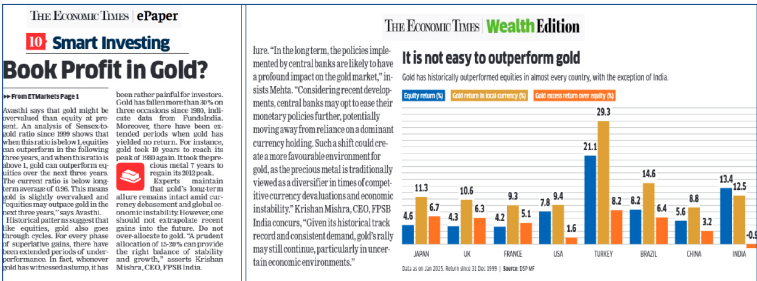
Other Interesting Articles:

KNOW MORE

With gold prices at all time-high, should you increase your allocation to gold, or is it time to scale back investments in the yellow metal? – **Economic Times**



Gold prices at record high! Have yellow metal prices peaked? Check these 5 Charts before putting more money in gold – **The Times of India**



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.



TESTIMONIALS

“



The CFP® certification program has profoundly transformed my career and deepened my expertise in wealth and legal consultancy. It has equipped me to empower my clients to rise above their financial challenges and passionately pursue their financial goals. By crafting well-structured financial plans, I guide them on a journey to manage and eliminate their debts, paving the way for a future of financial freedom and possibilities.



”

ADV. Vinay Chaudhary CFP®

MD, Finvin Consultants Pvt. Ltd. & CEO, Divyanshi Pharma Pvt. Ltd.

“



Being a CFP® professional for over a decade has helped me establish a successful journey in the financial planning industry by building trust and confidence with my clients. This globally recognized certification has enabled me to offer holistic solutions across investment analysis, retirement, tax, and estate planning. Regular engagement with the CFP® community through ongoing training keeps me aligned with industry trends and best practices. It has expanded my service offerings, set me apart in a competitive market, and boosted my confidence. Above all, guiding clients toward their financial goals brings immense satisfaction and professional growth.”



”

Madhavi Reddy CFP®

Director, Madhavi Reddy Advisory Services Pvt. Ltd.

SOCIAL MEDIAL HANDLES

