

MESSAGE FROM THE CEO

Dear CFP® Professionals,

As we step into a vibrant new quarter, I am delighted to welcome you to the May 2025 edition of our newsletter. This month, we have made some remarkable strides that reflect our shared commitment to strengthening financial literacy, professional excellence, and national impact.

Let me begin by expressing my sincere gratitude to all the CFP® professionals who continue to be the torchbearers of trusted and ethical financial advice. Your active participation in our events, webinars, campaigns, and knowledge-sharing platforms has not only elevated our standards but also inspired new professionals to join our journey of transformation.

April was a milestone month for FPSB India, and it was made even more special by the high-energy visit of Dante De Gori, CFP®, Global CEO of FPSB Ltd. We were thrilled to welcome him with a packed and purposeful schedule across Mumbai, Delhi, and GIFT City. Dante was a part of all our recent landmark initiatives and expressed his appreciation for the positive momentum and renewed energy within the FPSB India team and the wider CFP® professional community. His words of encouragement reaffirmed that we are moving in the right direction with unity, purpose, and vision.

One of the defining highlights was the FPSB India Summit 2.0, held on 7th April at K J Somaiya Institute of Management in Mumbai. It brought together an inspiring mix of top academicians, industry experts, entrepreneurs, and CFP® professionals. Under the powerful theme, "Empowering the New Bharat: Financial Education as the Key to Entrepreneurship & Employability," the summit explored the future of work and wealth in

India. The engagement and energy from all participants made it an unforgettable success and Dante's presence made it all the more momentous.

We were also proud to formalize our MoU with the National Pension System Trust (NPS Trust), a strategic initiative to promote early retirement planning and empower India's youth to take ownership of their financial future. Through this collaboration, we aim to instil financial discipline, long-term thinking, and goal-based planning, equipping the next generation with the tools to lead financially secure lives.

Further strengthening our ecosystem, our collaboration with the PHD Chamber of Commerce and Industry (PHDCCI) led to a landmark conference on "The Path to Viksit Bharat: Unlocking the Power of Financial Education" in New Delhi. This event sparked powerful conversations on how structured financial education can be a catalyst for a self-reliant India. We also signed an MoU with PHDCCI to jointly promote financial literacy, reinforcing our purpose of embedding financial education as a foundational life skill and a pillar of national progress.

At the global financial hub of IFSC GIFT City, we hosted an exclusive Leadership Roundtable in collaboration with IFSCA, where key stakeholders came together to explore strategies for attracting, retaining, and upskilling talent. A proud outcome of this dialogue: FPSB India is thrilled to share that CFP® professionals are now officially recognized under the IFSCA (Capital Market Intermediaries) Regulations, 2025. This recognition is a landmark moment for our profession and a testament to our alignment with global standards.



Looking ahead, I'm excited to share that FPSB India will be hosting the International Conference for Financial Planning on 22nd July 2025 in New Delhi. This flagship event will bring together global and Indian thought leaders, policy influencers, educators, and professionals to shape the future of financial planning.

In closing, I want to thank each of you for being an essential part of this journey. Whether you are mentoring students, upskilling yourself, volunteering with us, or simply spreading the word, your contribution is helping redefine financial planning for the New Bharat.

Let us continue to grow, learn, and lead together

Krishan Mishra.

**Chief Executive Officer,
FPSB India**

FPSB India signs MoU with PHDCCI to Boost Financial Literacy

FPSB India and the PHD Chamber of Commerce and Industry (PHDCCI) have signed a Memorandum of Understanding (MoU) to promote financial literacy and advance financial planning awareness across India. The collaboration combines FPSB India's financial planning expertise with PHDCCI's industry reach to drive grassroots financial education initiatives.

The MoU was formally signed by Krishan Mishra, CEO, FPSB India and Shalini S Sharma, Assistant Secretary General, PHD CCI, in the presence of Dante De Gori, Global CEO- FPSB Ltd. Amisha Sethi, Sr. Vice President – Policy & Communications; Rajesh Singh, Regional Head – Business Development; and Himani Sharma, Sr. Manager – Brand & Marketing, FPSB India.



KNOW MORE



FPSB India and NPS Trust Partner to Promote Retirement Planning Among Youth

FPSB India has signed a strategic MoU with the National Pension System Trust (NPS Trust) to advance financial literacy and promote early retirement planning among India's youth.

The agreement was signed on April 10 by Krishan Mishra, CEO, FPSB India, and Suparna Tandon, CEO, NPS Trust, in the presence of Dante De Gori, CFP®, Global CEO, FPSB Ltd. Key FPSB India leaders Amisha Sethi (Sr. VP – Policy & Communication), Rajesh Singh (Regional Head – Business Development), and Himani Sharma (Sr. Manager – Brand & Marketing) were also present. This collaboration marks a major step toward building a financially secure future for young Indians.



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A Landmark Achievement: CFP® Professionals Now Eligible for Key Roles at IFSC, GIFT City!

FPSB India Team is proud to share a landmark recognition for the CFP® certification! As per the IFSCA (Capital Market Intermediaries) Regulations, 2025, CFP® professionals are now officially eligible to be appointed as Principal Officers of a distributor, investment advisor, or research entity at IFSC, GIFT City.

This prestigious recognition, published in the Gazette of India: Extraordinary, underscores the growing demand for globally certified, client-centric professionals in India's premier international financial hub. It reflects the strong alignment between regulatory vision and global standards in financial planning.



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Strengthening Pathways for Banking Professionals: FPSB & IIBF in Strategic Dialogue



FPSB Global CEO, Mr. Dante De Gori, and FPSB India CEO, Mr. Krishan Mishra, recently met with Mr. Biswa Ketan Das, CEO of the Indian Institute of Banking & Finance (IIBF), to explore collaborative pathways for CAIIB and JAIIB qualified banking professionals to pursue the CFP® certification. The discussion also focused on launching joint initiatives and events to promote financial planning education across India's banking ecosystem, marking a step forward in creating more structured professional opportunities for the country's financial services community.

FPSB India Explores Collaboration with Christ University, Bengaluru

The FPSB India team recently visited Christ University, Bengaluru, for a meaningful interaction with Dr. Rajiv U Kalebar – Prof. Of Finance, laying the foundation for an exciting partnership ahead. The meeting was led by Krishan Mishra, CEO, FPSB India, along with Amisha Sethi, Sr. VP – Policy & Communication, Teena Rawal, Head – Business Development, Anurag Nigam, National Manager– Business Development and Lushika Sahu, Sr. Manager – Partner Success & Strategy.

We look forward to organizing impactful events together and advancing financial planning education across campuses!



FPSB India Engages with SP Jain Global at Wealth Management Summit



Teena Rawal, Head – Business Development, FPSB India, recently represented the organization at the Wealth Management Summit hosted by SP Jain Global Institute in Mumbai.

As a panelist, she shared insights on emerging trends and challenges in wealth management for Indian families. The event offered valuable networking opportunities and sparked discussions around potential accreditation of their financial planning program.

HIGHLIGHTS OF THE MONTH

Announcing the **March 2025 Edition** of the Journal of Financial Planning in India



We are excited to release the March 2025 edition of the Journal of Financial Planning in India, featuring expert insights from CFP® professionals and industry leaders across the FPSB global network.

This edition is optimized for mobile devices, making it easy to access anywhere. Additionally, you can earn 4 CPD credits by completing the enclosed quiz.

Access the quiz through your MyFPSBLearning portal to earn credits seamlessly!

DANTE DEGORI VISITS TO **INDIA**

FPSB India Summit 2.0: Empowering the New Bharat Through Financial Education



Held on 7th April, at the K J Somaiya Institute of Management, Mumbai, the FPSB India Summit 2.0 brought together top academicians, educators, industry leaders, CFP® professionals, policymakers, and students to explore the transformative role of financial education in driving entrepreneurship and employability in the New Bharat.

With powerful keynotes and panel discussions on navigating market volatility, future-proofing CFP® professionals, AI & fintech trends, and the integration of financial literacy into careers, the summit sparked meaningful conversations and inspired action toward a financially empowered India. The event also provided an excellent platform for networking and Continuing Professional Development (CPD) for our CFP® community.

A heartfelt thank you to our esteemed speakers, panelists, academic partners, and enthusiastic attendees for making this summit a grand success. Special thanks to the FPSB India Team for their tireless efforts in curating and delivering yet another impactful event that's shaping the future of financial planning in India.

**Looking forward to
the next one!
Stay tuned for more
updates.**

UNTIL THEN, CATCH A GLIMPSE OF THE FPSB INDIA SUMMIT HERE



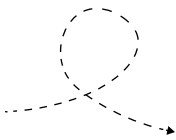
Panel 1

Panel 2

Panel 3



For Event Pictures?



CLICK HERE

Leadership Roundtable at GIFT City: Shaping the Future of Financial Services Talent

FPSB India, in collaboration with the International Financial Services Centres Authority (IFSCA), hosted a high-impact Leadership Roundtable at GIFT City on 9th April 2025. The event brought together senior leaders from fund houses, banks, legal firms, AMCs, IFSCA, NSE IX, and FPSB India, to discuss strategies for attracting, retaining, and upskilling financial professionals in India’s global financial hub. The session focused on building a world-class talent ecosystem to meet the growing demand for cross-border advisory services and global financial planning capabilities.

The event was kicked off by Amisha Sethi, Sr. Vice President – Policy & Communication, FPSB India, setting the tone for the day. Opening remarks were delivered by senior IFSCA officials, Dr. Dipesh Shah (Executive Director) and Pradeep Ramakrishnan (Executive Director). This was followed by a warm welcome note from Dante De Gori, CFP® (Global CEO, FPSB Ltd.) and Krishan Mishra (CEO, FPSB India).



The Leadership Roundtable was co-moderated by Dr. Dipesh Shah and Pradeep Ramakrishnan and featured insightful contributions from Teena Rawal, Head – Business Development, FPSB India. The discussion highlighted strategies to attract, retain, and upskill financial professionals at GIFT City, underscoring the importance of the CFP® certification in this evolving landscape.

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Unlocking the Power of Financial Education for a Thriving Bharat – PHDCCI Event



On April 10, FPSB India and PHDCCI jointly hosted a high-impact conference on “The Path to Viksit Bharat: Unlocking the Power of Financial Education” at PHD House, New Delhi. The event brought together thought leaders to highlight how financial literacy and planning can fuel India’s economic resilience and inclusive growth.

Prof. Anil Sahasrabudhe, Chairman – NETF, NAAC & NBA, graced the occasion as Chief Guest, with Dr. (Prof.) Indrani Bhaduri, Head – Education Survey Division, NCERT, as Guest of Honour. Dante De Gori, CFP®, Global CEO, FPSB Ltd., delivered a compelling keynote on the global relevance of financial planning, while Krishan Mishra, CEO, FPSB India, underscored the importance of embedding financial education in India’s development journey.

Other key voices, including Suresh Kumar Sethi, Founder & CEO, Insurance Foundation of India, emphasized insurance penetration and savings through formal education.

Amisha Sethi, Senior Vice President – Policy & Communication at FPSB India, steered a thought-provoking panel discussion titled “The Seeds of Financial Awareness: Higher Education’s Role in Building Financial Futures”, emphasizing the critical role academic institutions play in nurturing financially empowered youth.



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WEBINARS

PODCASTS

Shaping Future-Ready Finance Leaders | FPSB x IIM Ahmedabad Podcast

Tune in to this engaging podcast episode featuring Dante De Gori, CFP®, Global CEO of FPSB; Krishan Mishra CMGR FCMI, CEO of FPSB India; and Prof. Joshy Jacob from IIM Ahmedabad, as they discuss the integration of financial planning into MBA curricula.

Gain insights on:

- Global trends in financial planning education
- Why financial planning is crucial for MBA students
- The launch of the new Executive Programme in Financial Planning and Investment Advisory Services in collaboration with FPSB India and IIM Ahmedabad

This one-year program empowers mid-to-senior professionals with skills in investment, tax, and risk management, leading to CFP® certification.



Watch the full podcast
and explore how IIM
Ahmedabad and FPSB
India are shaping the future
of financial education.



Redefining Career Paths | Fireside Chat with Teena Jain Kaushal, CFP®

As part of FPSB India's Monthly Webinar Series, Teena Jain Kaushal, CFP® and Editor – Personal Finance at Business Today, joined Amisha Sethi, Sr. VP – Policy & Communication, FPSB India, for a dynamic conversation on unconventional career opportunities for CFP® professionals.

From media to personal finance advocacy, the session offers insights on building your brand and thriving beyond traditional roles.

Now streaming on YouTube – don't miss it!

UPCOMING WEBINAR!

Title- Masterclass: Setting Up a Successful Financial Planning

Thinking about starting your own financial planning practice? Don't miss our upcoming masterclass on 30th May 2025 at 4:00 PM! Gain actionable insights from Viresh Patel, Founder of Financial North and a distinguished CERTIFIED FINANCIAL PLANNER® professional, as he shares practical strategies and key lessons from his journey of building a successful fee-based financial planning practice.

Moderated by Anshul Srivastava, Head – Standards & Examinations, FPSB India.






MASTERCLASS ON

Manage a Successful Financial Planning Practice



Viresh Patel CFP®
*Founder,
 Financial North*

GUEST SPEAKER



Anshul Srivastava CFP®
*Head of Standards &
 Examinations, FPSB India*

MODERATOR



Friday
30th May 2025



Time
**04:00 PM - 5:30 PM
 (Q&A Included)**

REGISTER NOW

Register now to learn how to successfully launch and grow your practice!

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.

FPSB India's CEO Featured on the Cover of The CEO Magazine – India

We are delighted to share that Krishan Mishra CMGR FCMI, CEO of FPSB India, has been featured in the cover story of The CEO Magazine – India!

Titled "The Architect of India's Financial Planning Transformation," the article celebrates his visionary leadership and the strides FPSB India is making in advancing financial planning education across the country.

A proud moment for the entire FPSB India community!



KEY ANNOUNCEMENTS:

IFSCA Expands Talent Criteria with Inclusion of CERTIFIED FINANCIAL PLANNER® Certification

The Tribune



IFSCA Expands Talent Criteria with Inclusion of CERTIFIED FINANCIAL PLANNER® Certification

LOKMAT TIMES



FPSB India & PHDCCI Sign MoU to Promote Financial Education for Viksit Bharat 2047

APN NEWS



The big gap in financial planners in India. Can FPSB India step up?

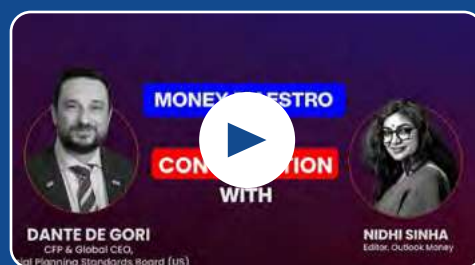
ET THE ECONOMIC TIMES



Episode 9 of Wealth Wizards Now Streaming!

In the latest episode of Wealth Wizards, Dante De Gori, CFP®, Global CEO of FPSB Ltd., shares expert insights on the role of alternative assets in building a smart and diversified investment strategy. Conducted by Nidhi Sinha, Editor of Outlook Money, the conversation offers a global perspective on sustainable investing.

A special thanks to Outlook Publishing (India) Pvt. Ltd. for their collaboration.

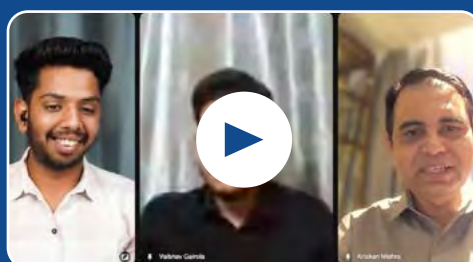


**WATCH
HERE!**

FPSB India CEO Featured on The Rakshit Show – Episode 34

Krishan Mishra, CEO of FPSB India, was featured on The Rakshit Show (Episode 34), where he shared valuable insights on personal finance and the future of the CFP® certification in India.

Don't miss this engaging conversation on finance, career opportunities, and FPSB India's mission to build a financially empowered nation!



Other Interesting Articles:



India one of the fastest growing territories for CFP certification, has a young population that's willing to learn", FPSB Chiefs – **The Economic Times**



Not enough certified financial planners in India to meet growing demand: FPSB CEO Dante De Gori – **The Press Trust of India**



Why Good Financial Advice Matters More Than Ever: **FPSB CEO Dante De Gori**



Salary Expert Insights Powered by **ERI**



Two insightful articles from the CFP Certification series have been featured in Edex by The New Indian Express. The fourth article outlines the eligibility criteria for both Regular and Fastrack pathways, while the fifth highlights upcoming trends and changes in the CFP curriculum and exam format for 2025.



Both are authored by Mr. Krishan Mishra and include a backlink to the **FPSB India website**.

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

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The CFP® certification has been a game-changer & pivotal milestone in my Professional Journey. It provided a strong foundation in all key areas of financial planning and helped me deliver more holistic, goal-based advice with Deep Analytical & Strategical Thinking. The curriculum's Global Standards and ethical focus have strengthened my advisory capabilities and improved client trust. It's helped me approach wealth management with a more structured and client-centric mindset. It's also elevated my Professional credibility and confidence as a Private Wealth Manager.



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Drishti Chhadva, CFP®
Senior Manager - Private Wealth Equentis
Wealth Advisory Ltd.



“

I, CFP Rtn. Purnendu Ray, MBA & CFP®, began my professional journey in 1993 as a distributor of financial products, including life insurance, general insurance, mutual funds, stock trading, and taxation services—all of which are covered in the CFP® certification curriculum.

However, it wasn't until I joined the preparatory classes for this certification in 2018 that I recognized the gap between my hands-on experience and structured financial planning.

Despite having 25 years of experience in the field, my methods were basic—mostly “rough work” done with pen and paper. The CFP certification program introduced me to precise, calculator-based techniques that significantly refined my approach. I passed the exam on my first attempt, much to the surprise of my 53 peers.

Earning the CFP® professional designation has transformed my professional identity, strengthened client trust, and elevated my standing by reflecting a rigorous, systematic, and credible approach to financial planning.



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Purnendu Ray, CFP®
Founder, Kconsultantray
(Financial Services since 1993)

SOCIAL MEDIAL HANDLES

