

### MESSAGE FROM THE CEO

Dear CFP® Professionals  
Family,

It gives me immense pride to share this month's edition of CFP® Professionals Connect with you. August 2025 has been truly remarkable for FPSB India and the financial planning profession at large. Together, we have celebrated milestones that reflect both our collective progress and the bright future that lies ahead for financial planning in India.

One of the most defining highlights was the International Conference on Financial Planning 2025 in New Delhi, where we welcomed delegates from our global affiliates, thought leaders, industry experts, and policymakers from across the globe. The discussions on sustainable finance, AI-driven advisory, and financial literacy showcased how India is taking a leadership position in reimagining the financial planning profession. This was further strengthened by the FPSB APAC Forum 2025, which placed India at the centre stage of regional collaboration, innovation, and knowledge exchange.

What inspires me most, however, is the energy and enthusiasm within our own CFP® community. Your commitment to raising professional standards, serving clients with integrity, and advocating for financial literacy is the true driving force behind our success. Each CFP® professional represents the gold standard of advice, ensuring individuals and families across India have access to trustworthy and holistic financial planning.

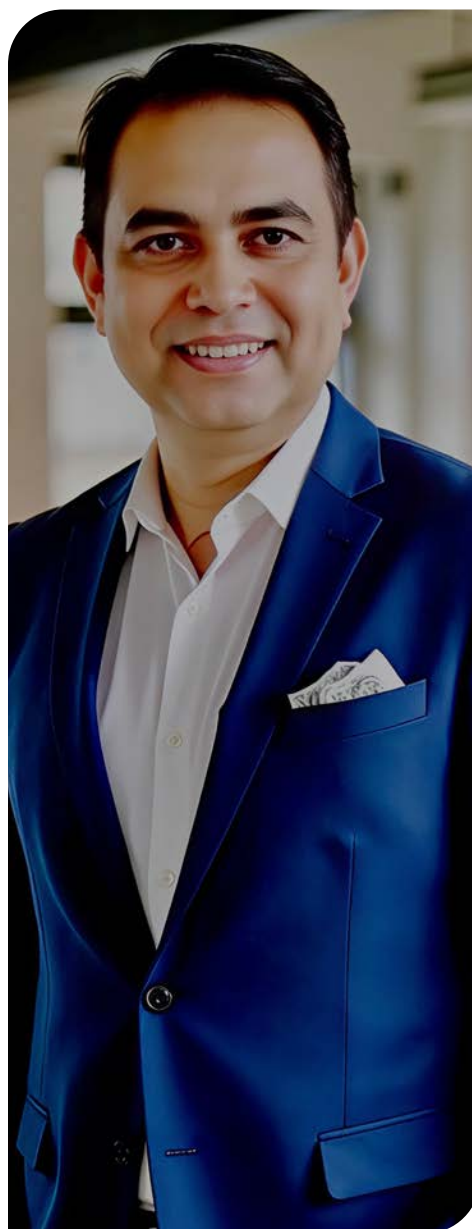
As we look ahead, the opportunities before us are

immense. With only a fraction of India currently financially literate, we have both a responsibility and a powerful mandate, to extend the benefits of financial planning to every household. By embracing technology, fostering ethical advisory practices, and building greater public awareness, we can truly change the way India manages money and wealth.

I invite each one of you to continue being ambassadors of this mission. Share your knowledge generously, mentor the next generation of professionals, and be the voice of responsible financial planning in your communities. Together, we can ensure that financial well-being becomes a reality for all Indians, not just a privileged few.

Thank you for your trust, passion, and dedication. Let us move forward with the same spirit of collaboration and innovation that has brought us this far.

The journey ahead is exciting, and I am confident that with the CFP® professionals community by our side, the best is yet to come.



*Krishan Mishra.*

Chief Executive Officer, FPSB India



# HIGHLIGHTS

## FOR THE MONTH!

### International Conference on Financial Planning 2025 PHD House, New Delhi | 22nd July 2025

The International Conference on Financial Planning 2025, hosted by FPSB India in collaboration with PHD Chambers of Commerce & Industry (PHDCCI), was a resounding success, bringing together global thought leaders, industry experts, and passionate professionals from the financial planning community.

The day was power-packed with Spotlight Sessions on retirement planning and strategic goal-based approaches, alongside Panel Discussions exploring global opportunities for CFP® professionals, women in financial planning leadership, and advancing financial awareness for a Viksit Bharat.

We were deeply honoured by the presence of our esteemed dignitaries – Dr. Bhim Singh, Honourable Member of Parliament (Rajya Sabha), and Shri Ananth Narayan G, Whole-Time Member, SEBI – whose addresses set a strong and inspiring tone for the day.

Your enthusiastic participation and insights made the conference impactful and memorable. We are delighted to share glimpses of this landmark event.



[VIEW EVENT HIGHLIGHTS](#)



[VIEW EVENT PICTURES](#)





# LATEST

## UPDATES & DEVELOPMENTS

### FPSB APAC Forum 2025 | India Hosts Global Financial Planning Leaders

FPSB India proudly hosted the FPSB APAC Forum 2025 at The Leela Palace, New Delhi, bringing together CEOs and thought leaders from across the globe. Over three impactful days, delegates exchanged ideas, built collaborations, and envisioned the future of financial planning.

This highlighted India's growing role in shaping the profession worldwide, while offering guests a chance to experience the country's vibrance and opportunities. A heartfelt thank you to our international participants for joining us and carrying back both new perspectives and lasting memories of India.



### FPSB India Signs MoU with SP Jain School of Global Management



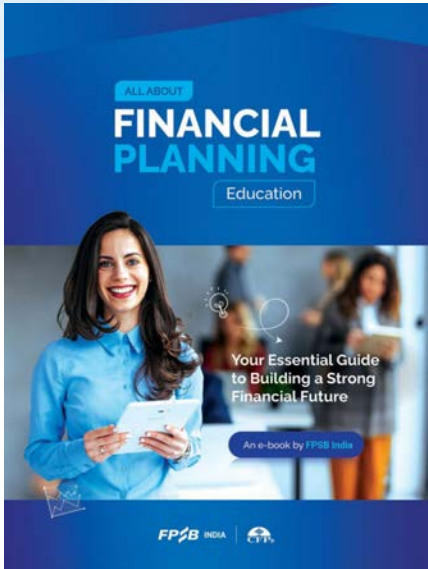
SP Jain School of Global Management has signed a landmark Memorandum of Understanding (MoU) with FPSB India, the Indian subsidiary of Financial Planning Standards Board Ltd. (FPSB Ltd.), becoming an FPSB accredited institution to offer the Masters in Applied Finance & Wealth Management program (AFWM) powered by CFP® certification.

The signing ceremony was held at SP Jain School of Global Management's Mumbai campus in the presence of Krishan Mishra, CEO, FPSB India; Teena Rawal, Head of Business Development, FPSB India, and Ram Kartha, CEO & Head of Campus and Dr. Arindam Banerjee, Associate Professor and Program Director, AFWM.

Under the MoU, SP Jain Global and FPSB India will collaborate on research, industry seminars, guest lectures, and continuing education initiatives for professionals, keeping faculty and students closely connected to the evolving demands of the financial services sector.



# Unveiling FPSB India’s eBook: All About Financial Planning Education



FPSB India is delighted to announce the launch of its new eBook, All About Financial Planning Education – Your Essential Guide to Building a Strong Financial Future. Unveiled at the International Conference on Financial Planning 2025 by Ananth Narayan G., Whole Time Member, SEBI, and Dante De Gori, CFP®, Global CEO, FPSB Ltd., the eBook serves as a comprehensive guide for students, professionals, and individuals at every life stage.

Authored by Amisha Sethi, SVP – Policy & Communication, FPSB India, under the guidance of Krishan Mishra, CEO, FPSB India, this resource simplifies core financial planning concepts and inspires readers to take charge of their financial journey. We invite you to explore the eBook and gain fresh insights into the future of financial planning education.



[CLICK HERE TO READ THE EBOOK](#) ➔



## Whitepaper Launch “The Role of Finfluencers in Shaping Financial Behaviour in India

During the International Conference on Financial Planning 2025, held in collaboration with PHDCCI, FPSB India introduced an insightful whitepaper titled The Role of Finfluencers in Shaping Financial Behaviour in India. The launch took place in the presence of Dante De Gori, CFP®, Global CEO, FPSB Ltd.

Authored by Arun Thukral, Professor of Finance, KJ Somaiya Institute of Management, with co-author Chelsea Mascarenhas, Alumnus, KJ Somaiya (MBA – Finance), the study explores how digital voices are transforming financial decision-making. It brings forward important findings, regulatory viewpoints, and practical recommendations, serving as a valuable reference for regulators, professionals, and industry leaders alike.



This publication is set to spark meaningful dialogue on building a more responsible and digitally aware financial ecosystem.

[CLICK HERE TO READ THE WHITEPAPER](#) ➔



# Strengthening Global Collaboration in Financial Planning



Ahead of our Delhi event, we had the pleasure of visiting Ahmedabad along with Sarah Abood, CEO, Financial Advice Association of Australia (FAAA) and David Sharpe CFP®, FAAA Chair, joined by Teena Rawal, Head of Business Development in FPSB India

During the trip, we held highly productive discussions with IFSCA, University of Wollongong, and Deakin University to lay the foundation for a two-year financial planning program.



This initiative will be recognized in both India and Australia, enhancing opportunities for students and professionals while promoting cross-border mobility of talent. We look forward to the impact this collaboration will create in shaping globally competent financial planners.

## Strengthening Excellence: Edufinpact and IMS Proschool Elevated to Premium Education Providers

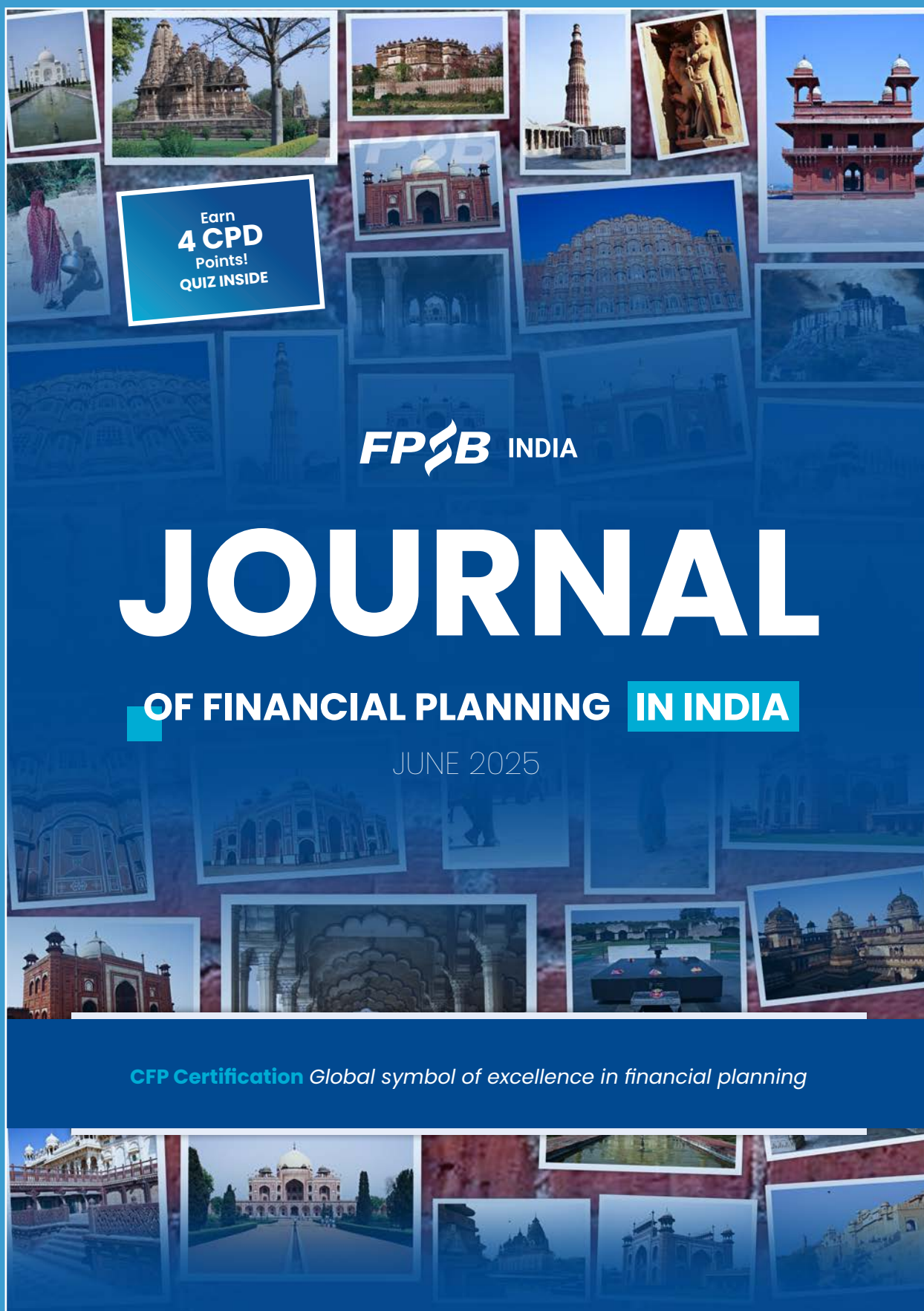
FPSB India is delighted to announce that IMS Proschool and Edufinpact, two of our Education Providers, have now joined the league of Premium Education Providers.

This achievement reflects our shared vision of nurturing future-ready financial professionals and expanding access to high-quality learning opportunities. We warmly congratulate IMS Proschool and Edufinpact on this elevation and look forward to creating greater impact together. This further strengthens our commitment to delivering world-class financial planning education.





## Journal of Financial Planning in India – June 2025 Edition: Now Available!



Earn  
**4 CPD**  
Points!  
QUIZ INSIDE

**FPSB** INDIA

# JOURNAL

**OF FINANCIAL PLANNING IN INDIA**

JUNE 2025

**CFP Certification** *Global symbol of excellence in financial planning*

We are pleased to share the June 2025 edition of the Journal of Financial Planning in India, featuring thought-provoking articles from CFP® professionals and leading experts across India and the global FPSB network.

We invite you to explore this edition and make the most of the knowledge and learning opportunities it brings.

**FOR A QUICK READ**



# UPCOMING WEBINAR

## Missed Our Webinar on Future of Passive Investing in India and Career Opportunities?

If you couldn't join us live on 5 September 2025, you can still catch the insightful discussion with Anil Ghelani, Senior Vice President & Head – Passive Investments and Products, DSP Mutual Fund, moderated by Dr. Alok Kumar CFP, Head – Certification and Engagement, FPSB India. The session explored how passive investing is reshaping India's investment landscape and the career opportunities it creates for financial professionals.

Webinar Alert!

Future of Passive Investing in India and Career Opportunities

Presented by FPSB India

Friday, 5th September

04.00 PM - 05.00 PM IST

Register now

and be part of the future of investing!

Anil Ghelani

Senior Vice President,  
Head – Passive Investments & Products,  
DSP Mutual Fund

Alok Kumar

Head – Certification & Engagement,  
FPSB India

WATCH THE FULL WEBINAR HERE



## 11 September 2025 | 7:30 AM – 8:30 AM IST | How to Build Your Career as a Young Financial Planner

GLOBAL WEBINAR

How to Build Your Career as a Young Financial Planner

Thu 11 Sep | 02:00 – 03:00 UTC  
*Convenient for Asia-Pacific time zones*

Nick Grogan, CFP

United Kingdom

Angela Lau, CFP

Singapore

Calvin Scott, CFP

New Zealand

Gain practical tips & career insights  
Designed for young CFP professionals

REGISTER NOW

What does it take to build a successful career in financial planning today and where can the profession take you? In this global webinar, scheduled for the Asia-Pacific time zones, hear from three inspiring young CFP® professionals from Singapore, New Zealand, and the United Kingdom as they share their journeys, challenges, and lessons learned.

Moderated by Dante De Gori, CFP®, Global CEO of FPSB Ltd., the session features Nick Grogan, CFP® (UK), Angela Lau, CFP® (Singapore), and Calvin Scott, CFP® (New Zealand).

Whether you're starting out or planning your next step, gain real-world insights and inspiration to shape your path in financial planning.

REGISTER HERE





# ENGAGEMENTS

## WITH THE FINANCIAL PROFESSIONALS' COMMUNITY

### FPSB India at COFP Annual Retreat 2025

The FPSB India Team had the privilege of attending the COFP Annual Retreat 2025 at Clarks Exotica Resort, Bengaluru. Our CEO, Krishan Mishra, CFP®, delivered an engaging session, followed by a thought-provoking interview. The event was also attended by Hemambika Hariharan, Deputy Manager – Examinations, FPSB India.

Heartfelt appreciation to the COFP team, Suresh A CFP®, B Srinivasan CFP®, and Yuva Raja CFP® and for organizing such a grand and well-curated retreat.

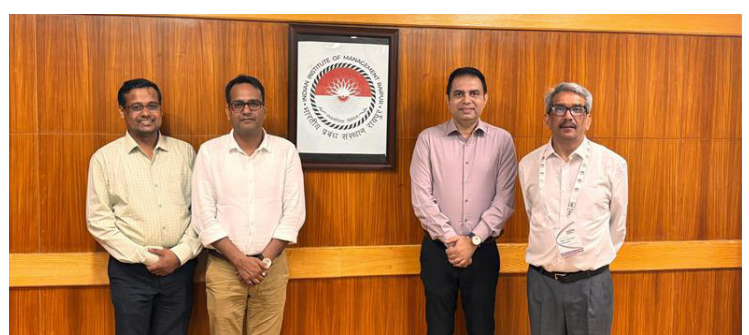


### Strategic Leadership Insights at IIM Raipur

FPSB India was invited by IIM Raipur to the first panel discussion of the 9th Leadership Summit, themed "The Strategic Shift: Virtues That Set CXOs Apart."

The session, moderated by Prof. Satyasiba Das, Dean – External Relations, IIM Raipur, brought together eminent leaders including Sandeep Singh, Managing Director, Tata Hitachi Construction Machinery; Subramanian Chidambaran, Chief Strategy Officer, Cummins India; Manoj Kumar Chaudhary, Chief Human Resources Officer, Edelweiss AMC; and Krishan Mishra, CEO, FPSB India.

Krishan emphasised purpose-driven strategy, customer focus, and the importance of early financial education. It was also a pleasure to interact with Prof. Sanjeev Prashar, Director-in-Charge, IIM Raipur, Prof. Pradiptarathi Panda, Professor of Finance, IIM Raipur, and Anurag Nigam, National Manager – Business Development, FPSB India, who were present on the occasion.



LINKEDIN POST





# Empowering Future Women Leaders in Finance at St. Francis College for Women, Hyderabad

Over 100 final-year BMS students at St. Francis College for Women, Hyderabad, participated in an interactive session on Financial Planning and Career Opportunities for Women through CFP® Certification.

The session was led by Anurag Nigam, National Manager- Business Development, FPSB India, and Bhavya Mahendra, Manager -Business Development, FPSB India, who shared valuable insights on the evolving financial planning landscape and the rewarding career paths available to women. Their engaging discussion encouraged students to envision themselves as future leaders in the profession.

A special thanks to the college for their warm hospitality and to the students for their enthusiastic participation.



## Krishan Mishra Speaks at TEDxBocconiUMumbai



We are proud to share that Krishan Mishra, CEO of FPSB India, recently took the stage at the TEDx event hosted by SDA Bocconi School of Management, Mumbai.

In his talk, “To Create a Financially Educated and Sustainable New Bharat,” he emphasized the vital role of financial education and the rising importance of financial planning in today’s dynamic world.

The platform provided a powerful opportunity to spark conversations that can shape the future of financial literacy and empower individuals to take charge of their financial well-being. A warm thank you to TEDxBocconiUMumbai for this meaningful platform, and to the FPSB India team members who were present in support.



FOR VIEWING THE SPEECH HIGHLIGHTS [→](#)



# Engaging with Future Leaders at NMIMS Bangalore

Amisha Sethi, Senior Vice President – Policy & Communication, FPSB India, and Teena Rawal, Head of Business Development, FPSB India, had the privilege of addressing nearly 400 first-year MBA students at NMIMS Bangalore.

The interactive session generated strong interest among students keen to explore opportunities with FPSB India, and discussions are underway to create a structured process for onboarding them. Amisha also shared insights from her recently authored eBook – ‘All About Financial Planning Education – Your Essential Guide to Building a Strong Financial Future’, inspiring students to embrace continuous learning as they prepare for their professional journeys.

We look forward to strengthening this engagement and welcoming aspiring financial professionals into our growing community.



# Orientation Session at GLS University, Ahmedabad

Teena Rawal, Head of Business Development, FPSB India, interacted with the MS Finance batch at GLS University, Ahmedabad, during their orientation program. She provided students with a clear and inspiring roadmap for their academic and professional journey in the field of financial planning.

The session was well-received, with students showing great enthusiasm and curiosity to learn more about opportunities ahead. We are excited to see their interest and look forward to supporting their growth as future financial professionals.



# Engaging Dialogue on India’s Financial Planning Landscape

Krishan Mishra, CEO – FPSB India, had an insightful interaction with Aprajita Sharma, CFP®, Editor – Personal Finance, MINT. Their discussion focused on the evolving financial planning and advisory landscape in India, along with the emerging opportunities for CFP® professionals in both practice and employment.

The exchange highlighted the growing recognition of financial planning as a critical profession for India’s future.





# WHAT NEXT?

## Save the Date: 6<sup>th</sup> November (Thursday)

Mark your calendars for 6th November 2025 as we convene for a flagship gathering of the financial planning community. The day will feature focused group discussions and knowledge-sharing sessions led by esteemed professors and industry leaders.

As part of the program, we will host the New CFP® Certificant Ceremony, celebrating professionals certified between 1st October 2024 and 30th September 2025 for their dedication and achievement.

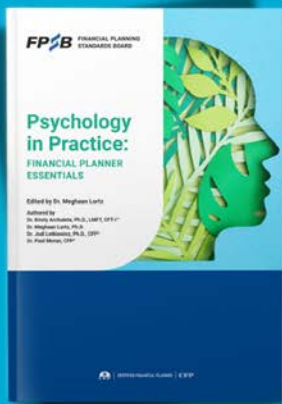
Adding to the excitement, the FPSB India Awards 2025 will also return this year! This annual celebration honours excellence across students, educators, education providers, and CFP® professionals. With new award categories and wider recognition, it's time to spotlight the brightest in financial planning.



Nominations opened on 22nd August 2025 - you can explore the dedicated awards page [here](#)

**Stay tuned** – more details about this much-awaited gathering will be revealed shortly!





***"In financial planning, numbers guide the strategy, but understanding people drives real success. Psychology in Practice course gives you that edge."***

## About

In financial planning, success is never just about numbers. It's about people. Behind every portfolio is a unique story, shaped by emotions, values, and life goals. The Psychology in Practice course bridges the gap between technical expertise and human connection, equipping financial planners with the skills to truly understand their clients, resulting in long-lasting relationships.

**Enrol Now**



**Know More**



# PSYCHOLOGY IN PRACTICE: Financial Planner Essentials



## REGISTRATION LINK FOR THE COURSE



# SPOTLIGHT NEWS!

## Beyond SIPs & Stocks – Krishan Mishra in DHAN TATVA


In the latest edition of DHAN TATVA by Ashvvy Investment Pvt. Ltd., Krishan Mishra, CEO – FPSB India, shares deep insights on the true essence of financial planning, aligning money with life goals, values, and aspirations.

In conversation with Ashwin Jain, CFP®, he debunks financial myths, discusses the role of AI in decision-making, and emphasizes how CFP® professionals are shaping financial security in India. Importantly, he reinforces why financial planning is for everyone, not just the wealthy.

# BEYOND SIPS AND STOCKS

*A Deeper Look into  
Financial Planning with  
FPSB India's CEO™*

Most people think financial planning starts with how much to invest and ends with which mutual fund to choose. But true financial planning goes much deeper — it's about aligning your money with your life, values, and dreams. In this special feature for *Ashviny* magazine, we sit down with the CEO of FPSB India — the body behind the CERTIFIED FINANCIAL PLANNER (CFP®) designation — to unpack what financial planning really means in today's India. From busting common money myths to explaining how AI and Instagram are shaping investor behavior, this conversation is equal parts insightful and surprising.

A portrait of a man, likely the CEO of FPSB India, smiling and wearing a blue blazer over a white shirt. He is positioned in the lower right corner of the page, partially overlapping the main title text.

EXPERT TALKS

Let's begin with the basics: What is financial planning anyway, beyond the textbook definition? Financial planning is the process of using your financial resources with your life goals. It's not about budgeting or paying the right insurance. It's a process and holistic process that helps individuals make informed decisions across a spectrum of financial issues in their lives. Whether it's buying a home, funding a child's education, preparing for retirement, or leaving a legacy, financial planning offers a structure, a roadmap to get there. It also considers your personal values, your life's mission, and your family's needs. In short, we emphasize that the financial planning is not just about numbers and figures, but about the person and the family. It's not only to build wealth but to achieve financial freedom and peace of mind.

**Financial planning is fundamentally about aligning your financial resources with your life goals. It's not just about budgeting or picking the right insurance policy. It's a dynamic and holistic process that helps individuals make informed decisions across all aspects of their financial goals in their lives**

People often confuse financial planning with investment planning. Can you explain the difference?

Financial planning encompasses several interconnected areas: investment planning, tax planning, estate planning, retirement planning, and risk management. While investment planning focuses on growing wealth, risk management involves protecting assets. Financial planning is a holistic approach, integrating all these aspects. It's not just about investment returns, but also about ensuring your financial goals are aligned with your long-term goals. The emphasis should be on the overall financial health and peace of mind, not just on investment returns. When we talk about financial planning, we don't

only talk about family life, where many people still rely on country side or friends over there. We also discuss the best way for financial planners?

Financial planning is not just about personal finance; it's about family and social responsibility. It's about helping people build wealth for family rather than for themselves. This isn't just about money; it's about the future of the family and the community. We have to have some understanding, especially family over here and over there.

Now, can the tax field be brought? By having financial planning, you can get a better understanding of the tax system. This starts with understanding, not only for the people, but also for the government. It's about understanding the tax system and how it affects the people who have wealth, communities, culture, and ethics. It's about understanding the tax system and how it affects the people who have wealth, communities, culture, and ethics. It's about understanding the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

As a financial planner, you also need to have a good understanding of the tax system and how it affects the people who have wealth, communities, culture, and ethics.

EXPERT TALK

Q—Has the definition of “wealth” changed in the last decade? If so, how does that affect the way we think about finances?

A—Absolutely, the definition of wealth has changed significantly. A decade ago, wealth was largely measured by tangible assets, income levels, or net worth. Today, people increasingly define wealth in terms of freedom, purpose, well-being, and time. There’s a greater focus on “voluntarism over voluntariness,” sustainability, and work-life balancing, and work-life balance.

In a solid financial planning profession, we must recognize and incorporate these broader life goals in planning strategies for our clients. Having aligned individual goals, both tangibles and intangibles, financial planners today must be more than mere value-driven, and more adaptable than ever before.

**At FPSB India, we promote the CFP® certification as a mark of global ethical and professional standards. But beyond technical competence, it reflects a deeper commitment to transparency and putting clients first.**

Q—If you could have one piece of financial advice given on WhatsApp or Instagram, what would it be?

A—Honestly, none of it should be trusted. People should avoid social media influencers who claim to be experts. One of the most misleading examples is the FOMC-shares chart.<sup>1</sup> It shows a correlation between the Fed Funds rate and FOMC shares, which are not related at all. This type of misleadingly complex financial analysis and extrapolations can lead to serious adverse effects. At times, unethical financial products like “get-rich-quick” schemes, which can lead to significant losses, are promoted.

In truth, there is no size-for-all investment. Financial planning is a highly personalized service. The client needs to know their own risk tolerance and its outcome. At FPSB India, we achieve this through a thorough understanding of the client's situation, and always consult a CERTIFIED FINANCIAL PLANNER (CFP®) for financial planning, portfolio management, personalized, and never based on trending topics.

What would you say to anyone who claims, “I’m a financial planner, but I don’t do financial planning”? That statement is far from true. Financial planning is not a title; it is a process. It involves understanding your client, managing their income resources to enable on journey of achieving their dreams.

FPSB India insists, “Value of Financial Planning Comes From Client.” It is not enough to call yourself a financial planner only for the sake of money. In fact, even if it is difficult to find a financial planner, it is better to hire a financial planner who provides superior quality financial services and confident, honest advice. FPSB India is committed to providing such sincere training. Good financial planning ensures you live the life you want, and not just survive. Financial planning doesn't merely involve numbers, but rather what your income level means to you. Financial planning will bring about a lifestyle change and being wealthy is not a universal right, it's a luxury. It's to make financial decisions, understand markets, and risks.

**How is the role of a CFP® Professional evolving and India, specifically in a world dominated by fintech and Direct investing apps?**

A—Fintech brought greater access and convenience, but it has also led to information overload. In this environment, the client needs a trustworthy advisor who can guide them. Clients need:

- new data that they need, clearly, quickly, and confidence to make informed decisions. CFP professionals are increasingly leveraging technological advancements to enhance client service. According to the recently released FPSB survey on the Future of Financial Planning report, over 70% of financial planners believe AI will help them serve clients more effectively, while 60% believe AI will replace the quality of financial advice.

It is a false dilemma, either/or, competition

[VIEW POST](#)



# Spotlight: Krishan Mishra on Entrepreneur’s Live Interview (ELI) Podcast

Krishan Mishra, CEO – FPSB India, recently featured on the Entrepreneur’s Live Interview (ELI) podcast, now streaming on YouTube and Spotify with over 1 lakh+ listeners and viewers!

In this engaging conversation, he delves into India’s financial literacy gap, the menace of mis-selling, the roots of financial planning from Chanakya’s Arthashastra, the role of AI in shaping financial advice, and why every Indian needs a financial plan with the power of CFP® certification.




[WATCH NOW](#) →

## Exclusive on 92.7 Big FM, Nagpur

This week, Krishan Mishra, CEO – FPSB India, joined RJ Avi on Big Chai to share insights on achieving financial freedom and the importance of financial planning for all. The conversation also touched upon preparing financially for study abroad, retirement, and the growing role of women in financial planning.

[LISTEN HERE](#) →









RJ AVI

KRISHAN MISHRA,  
CEO FPSB INDIA

EXCLUSIVE

FPSB INDIA ON AIR

BIG CHAI WITH RJ AVI



Press Release: International Conference on  
Financial Planning 2025 | New Delhi

india education diary



CXOtoday.com  
IT Perspective for Decision Makers



cafe mutual



Press Release: MoU Signing with Bharat Chambers

THE ECONOMIC TIMES



Outlook PLANET



BW CFO  
WORLD



ThePrint



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.



KNOW MORE





# TESTIMONIALS

“

With an MBA in Finance, I have had the chance to work across different teams in the finance domain, but what always intrigued me was personal finance. When I started exploring how I could deepen my domain knowledge, I came across the CFP® certification program. It gave me the tools to strengthen my expertise in areas like goal-based planning, retirement planning, risk management, and even understanding how our own biases influence investment decisions.

I have been able to transition my career from corporate finance to working full time in the financial planning and wealth management domain only after completing my CFP® certification. Becoming a CERTIFIED FINANCIAL PLANNER® has strengthened my credibility and built a sense

of trust with my clients. They feel assured that they're working with someone who can manage their finances responsibly and guide them with confidence and clarity towards achieving their goals.

I am genuinely grateful to the FPSB team for their efforts in spreading awareness about personal finance, and I feel proud to be part of the global CFP® professionals' community.

”



**Shubham Khandelwal, CFP®**

*Manager - Client Relationships, International Money Matters Pvt Ltd*



“

The CERTIFIED FINANCIAL PLANNER® (CFP) program has been a turning point in how I approach wealth management. It gave me not just technical knowledge across investments, risk, taxation, retirement, and estate planning, but also the ability to connect these pieces into a bigger picture for each client.

What I value most is how it shaped my mindset – to listen better, ask the right questions, and build portfolios that truly reflect clients' goals and changing realities. Every portfolio review or construction I do today is guided by the structured, client-first approach that my CFP® certification education instilled in me.

”



**Sana Hayer, CFP®**

*Senior Associate, Sanctum Wealth Private Limited, IIMK Alumni*



## SOCIAL MEDIAL HANDLES

