

MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

As I step into the role of leading FPSB India, with a renewed sense of purpose to carry forward our mission of advancing the financial planning profession and spreading the financial education & literacy in India. I acknowledge the good initiatives taken by my predecessors which enabled FPSB India to take a step forward in its journey towards realising the vision of the organisation. I am deeply inspired by the commitment of our team, our Board, and the growing network of CFP® professionals who continue to uphold the values of integrity, competence, and client-first service that define our community.

At FPSB India, we are entering an exciting new chapter filled with energy, collaboration, and innovation. Over the past few months, we have taken meaningful strides toward strengthening the financial planning ecosystem, from launching the Executive Program in Financial Planning & Investment Advisory with IIM Ahmedabad, to partnering with SIMSREE for the M.Sc. Finance Program and Masters in Applied Finance & Wealth Management at SP Jain Global. Each of these initiatives reflects our endeavour to build bridges between industry needs & academia, fostering excellence, and creating a pipeline of skilled finance professionals ready to serve India's evolving financial planning needs.

We also continue to deepen our thought leadership and engagement with the broader financial community. Our participation in prominent media platforms and industry events underscores our ongoing commitment to positioning the

CFP® profession's designation as a mark of trust and professional excellence.

Recently, we concluded our celebrations around World Financial Planning Day (WFPD) - a global movement that brings together over 230,000 CFP® professionals worldwide to champion financial well-being & promoting financial literacy. The enthusiasm and participation we witnessed from our community reaffirm our confidence in the strength, passion, and purpose of India's financial planners. The highlights of these celebrations will be featured in our next edition of CFP® Professionals CONNECT.

As we look ahead, I warmly invite you to join us for our upcoming flagship event, "Shaping Tomorrow – Building Practice Growth and Entrepreneurial Pathways for CFP® Professionals," on 6 November 2025, in Hyderabad. This event promises to be a landmark gathering of ideas and inspiration, a celebration of innovation, growth, and leadership in financial planning.

Together, we are building more than a profession, but shaping a movement that empowers individuals, transforms communities, and contributes meaningfully to India's financial future. I invite you to read this edition of CFP® Professionals CONNECT with pride and optimism as we continue this journey toward a more financially resilient and empowered India.



Chandrakant Sureka

*Chief Executive Officer,
FPSB India*

HIGHLIGHTS

FOR THE MONTH!

Shaping Tomorrow – Building Practice Growth and Entrepreneurial Pathways for CFP® Professionals

Hyderabad | 6th November 2025



FPSB India is proud to unveil a landmark event tailored exclusively for the growing community of CFP® professionals across India, titled, “Shaping Tomorrow – Building Practice Growth and Entrepreneurial Pathways for CFP® Professionals”. We invite you to join us on 6th November 2025, at the Novotel Convention Centre, Hyderabad, for an immersive and future-focused experience like no other.

This is not just another event but a transformative workshop-style program that blends interactive case studies, real-world role-plays, and practical insights. Designed to help both established and next-gen CFP® professionals sharpen their skills and master their craft, this meticulously curated day will challenge, inspire, and elevate your approach to financial planning.

Event Details:

- Date: 6th November 2025 (Thursday)
- Time: 9:00 AM to 6:00 PM | Venue Opens at 8:30 AM
- Venue: Novotel Hyderabad Convention Centre, Novotel & HICC Complex (Adjacent toHITEC City), P O Bag 1101 Cyberabad Post Office, 500081 Hyderabad, India
- CFP® professionals will be eligible to earn 4 CPD credits, and all attendees will receive a Certificate of Participation following the event.

This year’s event will also feature two special celebrations:

New CFP® Certificant Ceremony – Honoring the completion of the CFP® certification by those who earned their CFP® certification between 1st Sept 2024 – 30th Sept 2025. Inviting all New CFP professionals from this batch to register under this category and be a part of this ceremony.

FPSB India Awards 2025 – The much-awaited Awards are back! With nominations now officially closed, the winners will be honored at the event and presented with their accolades by the esteemed Jury members.

REGISTER NOW →

Celebrations This Month: World Financial Planning Day 2025 | 8th October 2025

In collaboration with IOSCO, FPSB Ltd. and its global network proudly celebrate the ninth annual World Financial Planning Day (WFPD) this October. This global initiative unites more than 230,000 CFP® professionals to showcase how financial planning empowers individuals to take charge of their financial well-being. The day also coincides with IOSCO's World Investor Week (6–12 October 2025), focused on investor education and protection.

At FPSB India, we are gearing up to celebrate WFPD with our education partners, institutional collaborators, and corporate partners throughout the month.

Stay tuned and follow us on our social media handles for exciting updates and highlights from the celebrations.

[CLICK HERE](#) →



LATEST UPDATES & DEVELOPMENTS

First Batch Takes Off: Executive Program in Financial Planning at IIM Ahmedabad



FPSB India proudly celebrates the launch of the Executive Program in Financial Planning & Investment Advisory in collaboration with IIM Ahmedabad. The first batch kicked off their campus immersion on 29th September 2025, guided by Prof. Joshy Jacob and Prof. Ellapulli Vasudevan from IIMA, alongside Rajesh Singh, Regional Manager- Business Development from FPSB India.

This landmark program blends cutting-edge finance knowledge with practical insights, aiming to equip professionals with the skills, networks, and confidence to excel in the evolving world of financial advisory. A transformative journey has begun for the participants, setting new benchmarks in professional growth and industry impact.

We wish the batch all the very best as they embark on this exciting journey!

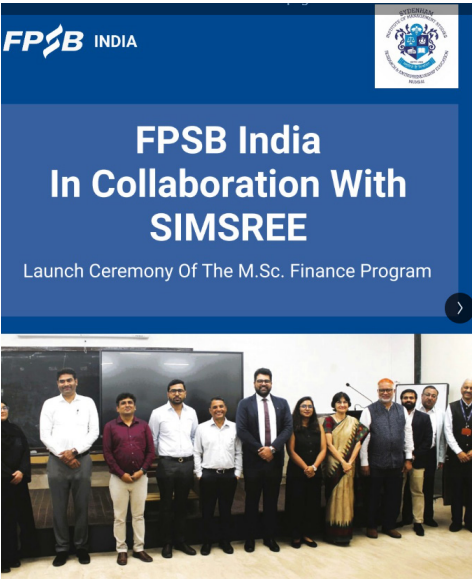
[DISCOVER MORE ABOUT THE PROGRAM](#) →

FPSB India & SIMSREE Launch M.Sc. Finance Program Course

FPSB India, in collaboration with Sydenham Institute of Management Studies, Research and Entrepreneurship Education (SIMSREE), proudly launched the inaugural batch of the M.Sc. Finance program.

The ceremony was graced by distinguished leaders from academia including Dr. Shriniwas Dhure (Director, SIMSREE), Dr. Sangeeta Pandit (Head of Finance Department), Dr. M.A. Khan (former Registrar, University of Mumbai & former Director, SIMSREE), and Dr. Rajan Welukar (former Vice Chancellor, University of Mumbai & former Director, SIMSREE). Representing FPSB India were Chandrakant Sureka (CEO), Teena Rawal, (Head of Business Development), and Sharath Nambiar (Management Trainee).

The program aims to bridge classroom learning with industry practice, equipping students to excel in financial services and advance financial well-being. A dedicated Finance Lab has also been set up to strengthen practical learning and research, with its formal inauguration scheduled at a later date.



[CLICK HERE](#) →

FPSB India at FFP Hyderabad Knowledge Session



FPSB India participated in an insightful session hosted by the Federation of Financial Planners (FFP) Hyderabad, where Mr. Manish of ICICI Prudential AMC shared perspectives on family offices and Mr. Partha Iyengar, Country Director at Plan Prompt, spoke on the role of behavioral science in client engagement.

Representing FPSB India, Bhavya Mahendra, Manager – Business Development for AP & Telangana, drew parallels between these discussions and FPSB India's Psychology in Practice course, underscoring its relevance in today's advisory landscape. She also took the opportunity to spotlight the upcoming FPSB India Annual Awards and share exciting career opportunities for CFP® professionals, while engaging with members, resource persons, and prospective partners from the financial planning community.



UPCOMING WEBINAR

15 October 2025 | 5:00 PM – 6:00 PM IST
“Smarter Retirement Planning Made Easy”
Know all about the Advanced NPS Calculator

FPSB India is hosting an exclusive webinar on “Smarter Retirement Planning Made Easy” featuring the Advanced NPS Calculator, a tool designed to simplify and optimize retirement planning. The session will be held on 15th October, Wednesday, from 5:00 pm to 6:00 pm IST.

Anand Kumar, Head of Investment, Research, and Risk at NPS Trust, will share insights on using the calculator to explore investment options, estimate retirement savings, and make informed decisions. Amisha Sethi, Senior Vice President – Policy and Communication at FPSB India, will moderate the session.

This webinar is a must-attend for CFP® professionals looking to provide data-driven, personalized retirement advice and strengthen their role as trusted financial advisors.

Register now to secure your spot and gain practical insights into smarter retirement planning!

The banner is blue with a grid pattern. It features the FPSB India and CFP® logos at the top left, and the NPS Trust logo at the top right. The main text reads 'Webinar Alert!' in large, bold, yellow letters, followed by 'Smarter Retirement Planning Made Easy' in white. Below this, it says 'Know all about the Advanced NPS Calculator'. A dark blue bar contains the date and time: 'Date: 17th October, Friday | Time: 5 pm to 6 pm IST'. At the bottom, there are two circular portraits of the speakers: Suparna Tandon (Chief Executive Officer, National Pension System Trust (NPS Trust)) and Amisha Sethi (Senior Vice President, Policy and Communication, FPSB India).

REGISTER HERE



Missed the Webinar on Future of Passive Investing & Career Opportunities

The banner has a blue background with white and orange text. It starts with 'Webinar Alert!' in white on a blue background. Below that, the title 'Future of Passive Investing in India and Career Opportunities' is in large white letters, followed by 'Presented by FPSB India' in smaller white text. A calendar icon indicates the date 'Friday, 5th September', and a clock icon shows the time '04.00 PM - 05.00 PM IST'. An orange button says 'Register now'. Below the button, it says 'and be part of the future of investing!'. On the right, there are two portraits of the speakers: Anil Ghelani (Senior Vice President, Head – Passive Investments & Products, DSP Mutual Fund) and Alok Kumar (Head – Certification & Engagement, FPSB India).

FPSB India recently hosted an insightful webinar on the “Future of Passive Investing in India and Career Opportunities”, featuring Anil Ghelani CFA, Senior Vice President & Head – Passive Investments and Products at DSP Mutual Fund, and moderated by Dr. Alok Kumar, CFP®, Head – Certification and Engagement at FPSB India.

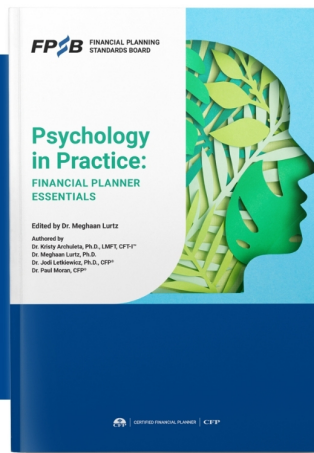
The session explored how passive investing is reshaping India’s investment landscape, the emerging career opportunities for finance professionals, and the crucial role CFP® professionals can play in this evolving space. Attendees gained valuable insights into ETFs, Index Funds, and strategies to leverage this growing segment.

WATCH THE FULL WEBINAR ON OUR YOUTUBE CHANNEL



PSYCHOLOGY IN PRACTICE: FINANCIAL PLANNER ESSENTIALS

Register Here >>



What if the difference between a good financial planner and an unforgettable one... is understanding how your client thinks?

You've mastered the numbers. Now master what drives behavior behind them.

Whether it's handling financial anxiety, client biases, or tough money conversations — this one-of-a-kind course blends neuroscience, behavioral finance, and practical psychology to help you serve your clients with deeper empathy and sharper strategy.

Here's what you'll gain:



Insights into client decision-making



Build stronger, longer-lasting client relationships



Emotional cues that impact financial conversations



Get a competitive edge in today's advice-driven market

Don't wait to stand out — your next breakthrough is just one decision away!

REGISTRATION LINK FOR THE COURSE



SPOTLIGHT NEWS!

FPSB India Featured in Outlook Money's Cover Story on "AI in Personal Finance"



FPSB India earned a prominent mention in Outlook Money magazine's cover story, "AI in Personal Finance."

The feature highlighted FPSB India's perspective on how emerging technologies like artificial intelligence are transforming financial decision-making and shaping the future of personal finance in India.

READ HERE



Empowering Viewers with Wealth Wisdom on Zee Business

FPSB India was featured on Zee Business, one of India's leading business news channels with over 14 million viewers, where it shared expert insights on wealth creation and the importance of financial planning on the flagship Money Guru show.

The segment highlighted practical strategies for individuals to build long-term financial security and achieve their life goals. The coverage was further amplified across Zee Business's digital and social media platforms, extending FPSB India's message of financial empowerment to a wider audience.



GST 2.0: A Game-Changer for India's Economic Future



On September 22, 2025, Prime Minister Narendra Modi unveiled GST 2.0—a landmark reform aimed at simplifying India's tax structure, boosting affordability, and empowering consumer savings. The new framework is set to streamline compliance for businesses, reduce costs on essential goods, and put more money back into people's hands.

As India moves toward a more efficient and transparent tax regime, GST 2.0 could well redefine the country's growth story and economic competitiveness.

[VIEW HERE](#)

Press Release: Celebrating World Financial Planning Day 2025



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



Manoj Naik, CFP®
Chief Finance & People Officer
Bima Sugam India Federation



“Over a 30+ years career, I have got exposure to all personal finance products across banking, lending, credit cards, wealth management, broking & health insurance as the CFO responsible for managing the company balance sheet. CFP® certification added a much-needed structured expertise in personal finance & tax optimization from a consumer lens - apart from areas like estate planning and retirement solutions. This certification gives an excellent view of consumer wealth journeys - protection, savings, asset management, retirement and estate planning and has expanded my ability to design truly customer centric solutions. Additionally, as a professional responsible for grooming talent, grounding in professional standards of financial advice is also a very valuable asset.

This globally recognized certification has given me the much-needed confidence & credibility to eventually pursue my desire to meaningfully contribute towards financial education in India”.



Zeal Doshi Thakkar CFP®
Co-founder
Zenith Finserve



“I pursued the CFP® certification program in 2017–18, and it proved to be a turning point in my career. It introduced me to the world of personal finance and wealth management, where I discovered the joy of guiding HNIs and Ultra-HNIs.

Teaching the CFP® program further brought out my passion for public speaking and training, and today it forms the foundation of the finance courses I conduct. For the past four years, I have also been successfully running my own financial planning practice. This certification truly helped me find a profession I enjoy and continues to shape my career journey”.

SOCIAL MEDIAL HANDLES

