

MESSAGE FROM THE CEO

Dear CFP® Professionals Family,

I am delighted to share this month's edition of FPSB India's newsletter, highlighting the remarkable progress, collaborations, and community engagement activities undertaken by us in our endeavour to promote the financial planning profession across India.

The past weeks have been especially vibrant for us at FPSB India. The highlight was hosting one of our flagship events – "Shaping Tomorrow: Building Practice Growth & Entrepreneurial Pathways for CFP® Professionals" on 6th November at Novotel Convention Centre at Hyderabad. The event was packed with activities, from insightful lectures to panel discussions for professional updates. It was followed by our much awaited, second edition of our Annual Awards. The event concluded with our convocation – where the enthusiasm and shouts of joy by the proud recipients of the coveted CFP® Certification filled the auditorium. The event got good reviews from all around and we are committed to improve further as we move ahead.

We took initiatives to connect with our CFP® professional communities across India by participating in the events and meetings organised by them. We had great interactions with CFP® Professionals in Mumbai, and our enriching participation at the FFP Annual Retreat at Hyderabad, each initiative brought fresh ideas, stronger connections, and renewed commitment toward professional excellence. It will be our endeavour to bring the ideas to action from the inputs received during these interactions.

Our recent strategic collaboration with IDFC FIRST Bank as an Approved Corporate Partner received wide media coverage, underscoring its potential to strengthen the culture of financial planning across the BFSI sector. The profession also continued to gain mainstream attention through compelling stories in Deccan Herald and Outlook Money, ranging from the rising demand for skilled financial planners to guidance for young professionals and travellers navigating financial decisions.

As we continue to expand our initiatives, strengthening partnerships, empowering CFP® professionals, and engaging with universities across the country, I invite you to stay connected, stay inspired, and continue championing the global standards of financial planning.

I invite all our readers to contribute articles on topics of professional interest to our quarterly Journal. If you wish to submit an article, please write to akumar@fpsb.in.

Thank you for being an integral part of the FPSB India community.

Warm regards,



Chandrakant Sureka

Chief Executive Officer, FPSB India

LATEST

INITIATIVES & ENGAGEMENTS

New Online Tool Supports CFP® Professionals Seeking Certification Across Asia-Pacific

FPSB Ltd. has launched an innovative online cross-border tool to help CFP® professionals in the Asia-Pacific region understand the professional requirements needed to obtain CFP® certification in another territory.

With the increasing mobility of financial professionals and clients' needs spanning multiple countries, this tool provides guidance for CFP® professionals who wish to expand their practice across borders, whether relocating temporarily, working in multiple territories, or maintaining certifications in more than one jurisdiction. The tool offers clear information on territory-specific requirements while also reminding CFP® professionals to ensure compliance with local regulatory practice obligations.



Learn more about this valuable resource and explore the cross-border requirements here:



Collaborating for Growth with the CFP® Professional's Community: Mumbai Dialogue

FPSB India hosted a meaningful and engaging gathering of CFP® professionals in Mumbai, fostering meaningful discussions on strengthening the CFP® certification program in India. We thank Pankaj Mathpal, Poonam Rungta, Harshvardhan Roongta, Kalpesh Ashar, Nisha Sanghavi, Pooja Bhinde, Jayant Vidhvans, Vivek Shah, Bhaven M. Bhatia and Pankaaj Maalde for their valuable participation and insights.

At FPSB India, we firmly believe in the power of collaboration, dialogue, and continuous learning to drive the growth and credibility of the financial planning profession. As we move forward, we remain committed to creating many more such platforms for meaningful engagement and professional development within the CFP® professionals community.

FPSB India Team Present:

Chandrakant Sureka, CEO

Dr. Alok Kumar, CFP®, Head – Certifications & Engagement,

Teena Rawal, Head – Business Development



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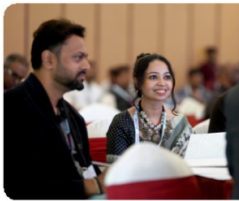


FPSB India at FFP’s 2nd Annual Retreat: Beyond Boundaries

FPSB India participated as the knowledge partner at the Federation of Financial Planners (FFP)’s 2nd Annual Retreat, held in Hyderabad on 14th–15th November.

Themed Beyond Boundaries, the two-day event featured keynote addresses, panel discussions, workshops, and interactive sessions covering macroeconomics, behavioural finance, mutual fund practices, estate planning, startup investing, and more. Chandrakant Sureka, CEO FPSB India delivered the keynote, while Anshul Srivastava CFP® - Head of Standards & Examinations, FPSB India shared insights from the Psychology in Practice course. FPSB India’s team, including Amisha Sethi, Sr. Vice President- Policy & Communications and Bhavya Mahendra, Manager – Business Development, actively engaged with participants throughout, alongside other team members.

Highlights included team-building activities, case studies from industry experts, and a motivational session by R. Sridhar on lessons from cricket applied to financial planning. FPSB India’s participation provided a rich platform for learning, networking, and exchanging ideas, reinforcing our shared commitment to advancing the profession.



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CFP® Certification Awareness Session at IIFT Kolkata

FPSB India recently conducted a CFP® Certification Awareness and Financial Planning Session at IIFT Kolkata, delivered by Subhankar Chakraborty, CFP®, whose practical insights made the session highly interactive and impactful.

We extend our sincere thanks to Dr. K. Rangarajan, Professor & Head, IIFT Kolkata Campus, and the representatives of Capital – The Finance & Investment Club, IIFT

Kolkata, for their valuable support. The session witnessed enthusiastic participation from over 100 students, including Finance Club members Prateek Anand, Dipesh Garg, Vadsariya Mahir, and Sarthak Oberoi. Key topics covered included goal-based planning, cash flow and net-worth analysis, insurance and investment planning, retirement readiness, tax planning (new vs. old regime), estate planning, and the evolving role of CFP® professionals.

The energy, curiosity, and engagement of the students were truly inspiring, and we look forward to strengthening our continued association with IIFT Kolkata.



HIGHLIGHTS

FOR THE MONTH!

Shaping Tomorrow 2025: Building Practice Growth & Entrepreneurial Pathways for CFP® Professionals 6th November 2025 | Novotel Convention Centre, Hyderabad

FPSB India successfully hosted Shaping Tomorrow 2025: Building Practice Growth & Entrepreneurial Pathways for CFP® Professionals on 6th November 2025 at the Novotel Convention Centre, Hyderabad. We thank all our CFP® professionals, students, speakers, partners, and delegates for their enthusiastic presence, which made the first half of the conclave vibrant and deeply impactful.

This event also featured two special celebrations: the New CFP® Certificant Ceremony, honoring professionals who earned their CFP®, and the FPSB India Awards 2025, where winners were felicitated and invited to receive their accolades directly from the distinguished jury members.

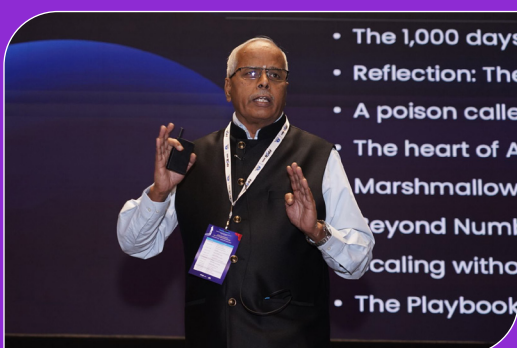


Keynote Address – Evolving Financial Landscape:

A. Balasubramanian, Managing Director & CEO, Aditya Birla Sun Life AMC Ltd., shared forward-looking perspectives on market evolution and the future of advisory excellence.

Fireside Chat – Best Practices & Growth Mantras for CFP® Professionals:

Dr. Ritwik Mishra, Chief Client Officer, KNOLSKAPE; Ashish Modani, CFP®, Founder & CEO, SLA Finserv; and Teena Rawal, Head – Business Development, FPSB India, discussed real-world strategies for sustainable practice growth and client trust.



Workshop – Common Do's and Don'ts in Practice:

B. Srinivasan, CFP®, Director, Shree Sidvin, delivered practical guidance on building a robust, ethical, and client-centric advisory practice.



Workshop – Regulatory & Compliance Frameworks:

Vishal Dhawan, CFP®, Co-founder, Plan Ahead WealthAdvisors, simplified the regulatory landscape and reinforced the importance of governance and compliance in advisory businesses.

Workshop – Personal Finance & Its Convergence with FinTech:

Dr. Vaibhav S. Joshi, Co-founder, Tableturn Tech, highlighted how technology is reshaping financial planning and client engagement.



Panel Discussion – Integrating Health & Financial Well-being:

Moderated by Arun Thukral, CFP®, Professor of Practice, K J Somaiya Institute of Management, with Priti D'Silva, Regional Head – West (SEVP), AON Risk Insurance Brokers Ltd.; Maj. Hemendra K. Singh (Retd), CFP®, Corporate Vice President & National Head – Defence Affinity Business, Axis Max Life; and Nisha Sanghavi, CFP®, Co-founder & Director, Promore Fintech, the session emphasised the growing need for a holistic approach to wealth and wellness.



Session – Self-Branding for CFP® Professionals:

Amisha Sethi, Senior Vice President – Policy & Communication, FPSB India, guided participants on building strong professional visibility and personal leadership.



Orientation to FPSB Standards:

Anshul Srivastava, CFP®, Head – Standards & Examinations, FPSB India, reinforced the ethical and professional benchmarks that define the CFP® certification.



Session – Psychology in Practice:

Dr. Sagneet Kaur, Senior Vice President – Behavioural Finance & Consumer Insights, PGIM AMC along with Anshul Srivastava, CFP®, Head – Standards & Examinations, FPSB India, offered powerful insights into investor behaviour and the emotional aspects of financial decision-making.

Closing Address:

The first half of the conclave concluded with thoughtful closing remarks by Dr. Alok Kumar, CFP®, Head – Certifications & Engagement, FPSB India, who reflected on the key learnings of the day and reinforced FPSB India's commitment to nurturing excellence, ethics, and continuous professional growth.



FPSB India Awards 2025

The FPSB India Awards 2025 was a truly special celebration, recognising individuals and institutions whose unwavering efforts continue to strengthen and shape the financial planning profession in India.

We sincerely thank our esteemed jury members - Arun Thukral CFP®, Professor of Practice at K J Somaiya Institute of Management; Abhishek Tiwari, CEO, PGIM India Mutual Fund; Teena Jain Kaushal CFP®, Editor – Personal Finance, MoneyControl.com; Dr. Ram Kartha, CEO & Head India, SP Jain School of Global Management; and Prof. Joshy Jacob, Professor at Indian Institute of Management, Ahmedabad (IIMA), for their time, wisdom, and thoughtful evaluation in recognising excellence across the community.



FPSB India extends its warmest congratulations to all the award recipients who continue to inspire, lead with integrity, and set new benchmarks of excellence through their innovation, dedication, and passion for the profession.

FPSB India Awards 2025 – Awardees

CFP® Professional of the Year 2024–25
(Practising)

Col Sanjeev Govila (Retd) CFP®



CFP® Professional of the Year 2024–25
(Working)

Abhishek Khudania CFP®



CFP® Professional of the Year 2024–25
(Woman)

Aishwarya Godbole-Nayak CFP®



Student of the Year 2024–25

Vikas Yadav



Education Provider of the Year 2024–25

**IIFC – Indian Institute for Financial
Certifications**



Educator (Faculty) of the Year 2024–25

Harminder Garg CFP®



Authorised Corporate Partner of the
Year 2024–25

HDFC AMC



Authorised Strategic Partner of the
Year 2024–25

Indian Institute of Banking and Finance



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Authorised Institutional Partner 2024–25

Sydenham Institute of Management Studies,
Research and Entrepreneurship Education
(SIMSREE)



Education Provider 2024–25 – Trailblazer
Award for Growth & Outreach

FPA Edutech Pvt. Ltd.



Education Provider 2024–25
Torchbearer Award

International College of Financial Planning
(ICOFP)



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NEW CFP® Certificant Ceremony

The New CFP® Certificants Ceremony was a proud celebration of professionals who have transformed their passion into purpose by earning the globally respected CFP® certification.

We extend our heartiest congratulations to all the new CFP® professionals—your hard work, perseverance, and commitment to client-centric planning continue to elevate the profession and empower countless lives. Your achievement reflects strong commitment to ethical financial planning.

Stay tuned for more such milestones as we continue to shape the future of financial planning together.



[WATCH VIDEO NOW](#)



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Even weeks after the event, we're thrilled to see FPSB India's initiative making waves in the media.

Media Coverage:

 [APN NEWS](#)



 [THE BANGALORE MONITOR](#) 



[Business News
This Week](#)



[The Hans India](#)



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[THE SME TIMES](#)
www.thesmetimes.com



 [తెలుగు
దేశం](#)
The Platform for NRI Telugu Community in the USA



[Biz Development News](#)



[National Biz News](#)



UPCOMING WEBINAR

19 December 2025 | 4:00 PM – 5:00 PM IST

Masterclass Webinar: Gold & Silver 2.0: Reassessing Their Role in Today’s Portfolio

With gold and silver witnessing a powerful rally, many investors are rethinking how these metals fit into their portfolios. To help you navigate this shift, FPSB India invites you to a focused masterclass on smart and strategic allocation of precious metals for both short-term and long-term planning.

This session will be led by Anshul Srivastava CFP®, Head of Standards & Examinations at FPSB India. With over two decades of experience in finance and financial education, Anshul brings practical insights that simplify complex concepts and help planners make more informed decisions.



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

REGISTER NOW



SOCIAL MEDIA CAMPAIGN HIGHLIGHTS

As part of our mission to enhance financial planning awareness across India, FPSB India continues to roll out engaging social media campaigns that combine storytelling, relatable scenarios, and the transformative power of professional financial guidance.

Campaign: Meet Raj – FPSB India’s First-Ever Comic Series

In the second chapter of our comic series, ‘The Money Monsters’, everyday financial habits come to life as tiny creatures only Raj can see - from the Impulse Buy Monster at the mall to the Credit Card Phantom and the Procrastination Panda.

Core message: With guidance from a CFP® professional, financial chaos can be tamed, turning stress into clarity and confidence.

We invite you to like, share, repost, and amplify these stories through your networks, helping more people understand the impact of professional financial planning

Meet the money monsters hiding in your habits.



Tiny delays → big disasters.



Before you know it, the money monsters slip in and take control.



In the end, when you choose financial planning, your monsters finally fall in line.



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SPOTLIGHT NEWS!

FPSB India in News

Stay updated on the latest stories featuring FPSB India and insights from the financial planning community making waves across to inspire conversations around financial planning:

Business News Matters



Business News Week

Only Business News



Content Media Solution
Simply Content



தினமலர்

உண்மையின் உரைகல்



Business Standard



**Outlook
MONEY**



What's trending in the financial services ecosystem.

DH



INDIA TODAY



THE ECONOMIC TIMES



cafemutual



THEWEEK



Z BUSINESS



moneycontrol



INDIA TODAY



NDTV



THE ECONOMIC TIMES



DH



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



Aishwarya Nayak, CFP®
*Financial Advisor /
Ideal Investments*



“Crossing a major AUM milestone at Ideal Investments brought with it a renewed sense of responsibility towards every client we serve. We wanted to ensure that our advice went beyond investments and reflected true financial stewardship. After consulting several experts, the CFP® Certification Program stood out for me personally. It was recommended as a course deeply connected to real-life financial decisions – something that would complement both my professional and personal perspective.

Once I registered, I realised just how practical and relevant the curriculum was to everyday scenarios. It equipped us to move from traditional financial planning to offering holistic personal finance solutions, including estate planning. The program also deepened our understanding of behavioural finance, allowing us to recommend options that align with clients’ goals and values.

More than anything, it helped us evolve from distributors or brokers into genuine financial planners dedicated to long-term client success.”



Pragnesh Patel, CFP®
*Proprietor / Steps Financial
Services*



“Earning the CFP® Certification has been a pivotal milestone in my professional journey as a financial planner. The program’s rigorous curriculum strengthened my technical expertise across investments, tax planning, risk management, retirement, and estate strategy. More importantly, it instilled a higher standard of fiduciary responsibility and client-centric decision-making.

The global recognition of the CFP® mark has enhanced my professional credibility, enabling deeper client trust and more meaningful advisory relationships. The certification has also opened doors to advanced career opportunities and a stronger network of financial professionals. Overall, the CFP® Certification has significantly elevated the quality of guidance I deliver and the confidence with which clients pursue their financial goals.”

SOCIAL MEDIAL HANDLES

